



# Elecāte™

INTELLIGENT **CATERING+EVENT+RENTAL** SOFTWARE

## User Manual

v 1.0 :: 5.3.2024





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# Welcome.

## Captivate customers.

## Accelerate productivity & profits.

**Elevate your catering, event, or rental business with the intelligent, all-in-one management software trusted by industry icons—created by industry experts**

To thrive, you account for every detail—we know. Elecate employs brilliantly efficient software with over 30 years of results for the complex needs of hospitality and rental businesses. Capture and track deals with our native CRM. Win more events with stunning proposals. Run comprehensive reports confirming your ROI. Accelerate your team's growth with extensive support and training.

From ingredients to inventory, dispatching to staffing, production to profit, Elecate is your guiding star.

**This guide is designed to help you utilize every feature to help you save more time and manage business flawlessly. If you have any questions, please reach out to our support team at [support@elecate.com](mailto:support@elecate.com) or create a ticket here: <https://elecate.com/submit-a-ticket>**



## Accessing Elecate

Elecate cares about you, and your customer's safety. With that in mind, we enforce a process of accessing your profile and content, that guarantees only authorized individuals can access sensitive information and perform actions in the system.

### Logging in with Email and Password

To log in using your email address and the password provided by your system administrator:

1. Enter your credentials click on Sign In

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Elecate  
Sign in to your account

Email  
@ellorconstellationf.com

Password  
.....

[Forgot Password?](#)

Sign In

### Single Sign On

To simplify the process of accessing the website, you can now sign in using your Google or Microsoft account.

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Elecate  
Sign in to your account

Email  
@ellorconstellationf.com

Password  
.....

[Forgot Password?](#)

Sign In

Or sign in with

Microsoft

Google

## Home Page Quick Tour



- a. **Main Panel:** Most features are listed and arranged inside these options.
- b. **Calendar:** The built-in calendar is a great way to visualize upcoming events.
- c. **App Setting Information:** System settings can be adjusted here, by an administrator.
- d. **Help Center:** In the Help Center, users can reference our FAQs.

# Sales & Marketing

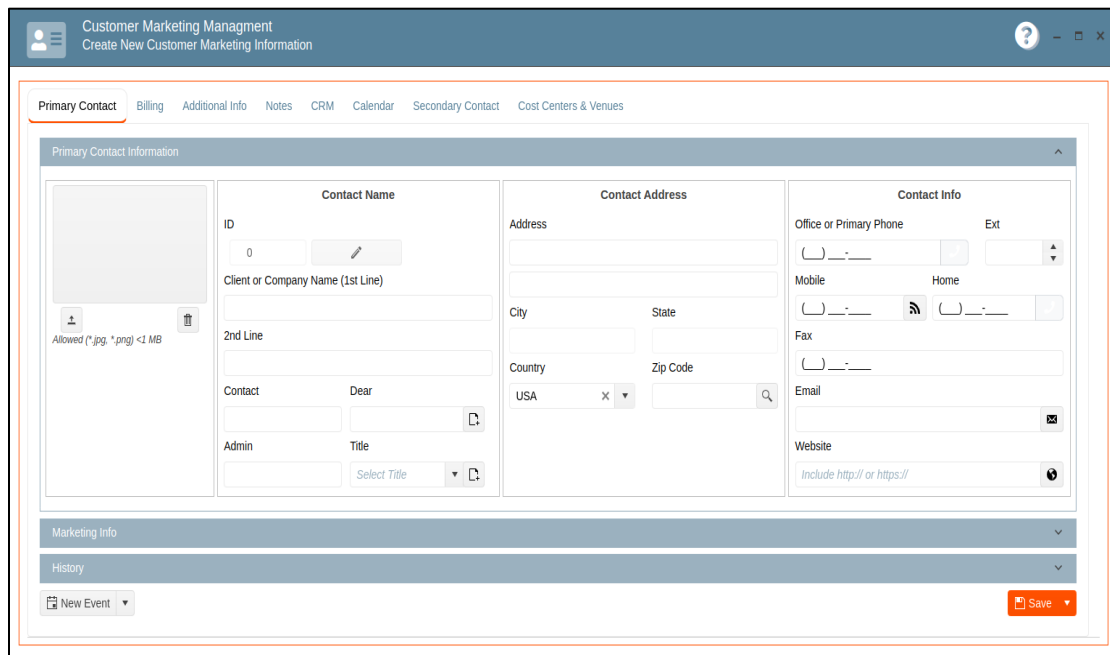


# Customer CRM

## Creating a New Customer

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on the *Customer (CRM)*
3. Click on *Customer Marketing*
4. Select *Create New Customer*
5. On the *Create New Customer Marketing* information screen, enter the following information:
  - a) Client or Company Name\*, Contact\*, Title (Event Management, Director Sales, etc.)
  - b) Contact Address, City, State, Country, and Zip Code\*
  - c) Contact Info Office or Primary Phone, Mobile, Home, Email\*
  - d) Referred by\*
5. Once you enter all the information click on “Save”.

\* All these fields are required to save changes successfully.

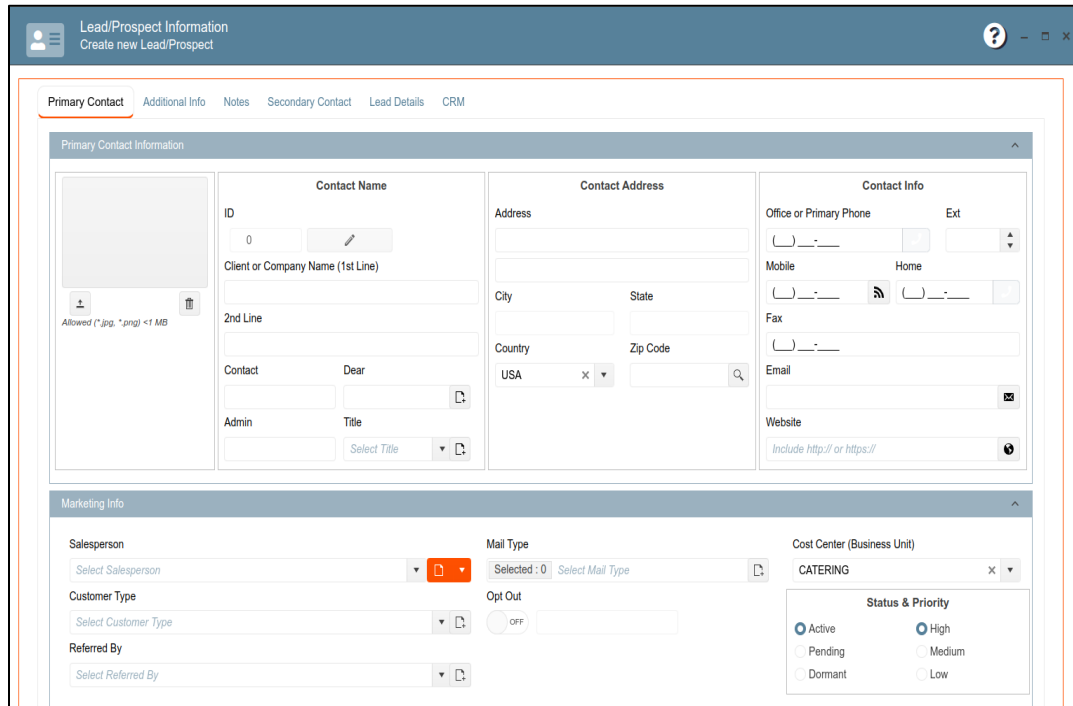


The screenshot shows the 'Create New Customer Marketing Information' form. The form is divided into several sections: 'Primary Contact Information', 'Marketing Info', and 'History'. The 'Primary Contact Information' section is further divided into three columns: 'Contact Name', 'Contact Address', and 'Contact Info'. The 'Contact Name' column includes fields for ID, Client or Company Name (1st Line), 2nd Line, Contact, Dear, Admin, and Title. The 'Contact Address' column includes fields for Address, City, State, Country, and Zip Code. The 'Contact Info' column includes fields for Office or Primary Phone, Ext, Mobile, Home, Fax, Email, and Website. The form also includes a 'New Event' dropdown and a 'Save' button.



## Edit Customer Information

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Customer CRM*, and then *Customers Marketing*. The *Customer Marketing Window* will appear
3. From the menu, click on *Customer Marketing Management*
4. Access to any client's information by clicking on the pencil icon or by double-clicking on the event row
5. Click on the pencil tool
6. From in the pop-up window, you can edit the customer's information
7. Once you have made all the changes, click on *Save*.



The screenshot shows a web application window titled "Lead/Prospect Information" with a sub-header "Create new Lead/Prospect". The window contains a navigation menu with tabs: "Primary Contact", "Additional Info", "Notes", "Secondary Contact", "Lead Details", and "CRM". The "Primary Contact" tab is active, displaying a form for "Primary Contact Information".

The form is divided into several sections:

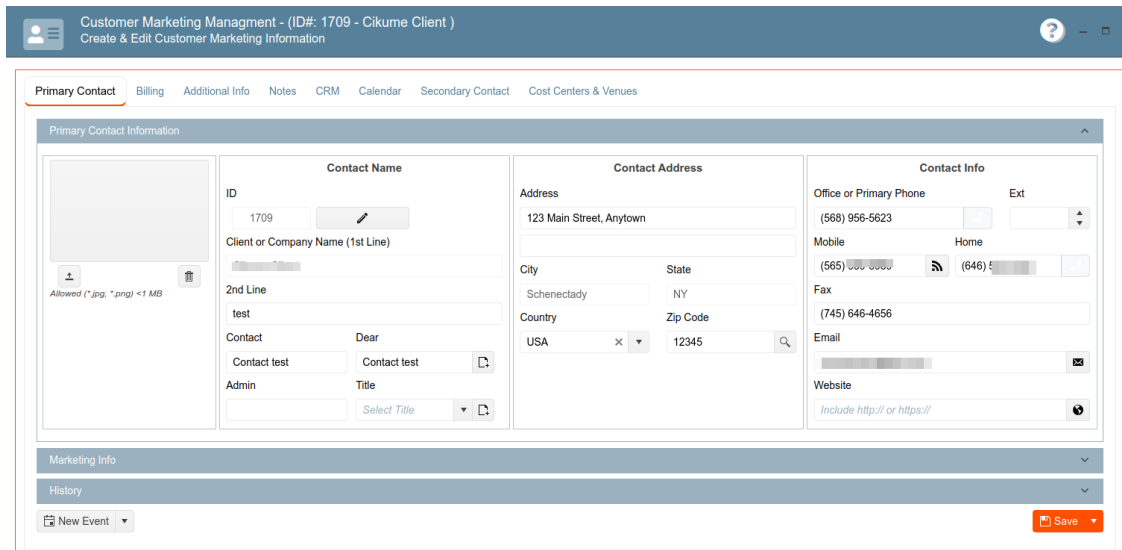
- Contact Name:** Includes fields for ID (0), Client or Company Name (1st Line), 2nd Line, Contact, Dear, Admin, and Title (with a "Select Title" dropdown).
- Contact Address:** Includes fields for Address, City, State, Country (USA), and Zip Code.
- Contact Info:** Includes fields for Office or Primary Phone, Ext, Mobile, Home, Fax, Email, and Website (with a note to "Include http:// or https://").
- Marketing Info:** Includes dropdowns for Salesperson, Customer Type, and Referred By; a "Mail Type" field (Selected: 0); a "Cost Center (Business Unit)" dropdown (CATERING); an "Opt Out" toggle (OFF); and a "Status & Priority" section with radio buttons for Active, Pending, Dormant, High, Medium, and Low.

## Create a New Prospect

Leads and Prospects are potential customers who have expressed interest or demonstrated potential in purchasing catering and event services but have not yet made a commitment. To create a new lead or prospects, follow these steps:

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Customer CRM* and then click on *Lead/Prospect*. The *Customer Lead/Prospect* window will appear
3. From the menu, click on *Lead/Create New Prospect*
4. Enter the following information:
  - Client or company name\*
  - Address, City, State, Zip Code, Country\*
  - Phone number\*
  - Email\*
4. Click on *Save*

\* All these fields are required to save changes successfully.



Customer Marketing Management - (ID#: 1709 - Cikume Client)  
Create & Edit Customer Marketing Information

Primary Contact | Billing | Additional Info | Notes | CRM | Calendar | Secondary Contact | Cost Centers & Venues

Primary Contact Information

Contact Name	Contact Address	Contact Info
ID: 1709 Client or Company Name (1st Line): 2nd Line: test Contact: Contact test   Dear: Contact test Admin:   Title: Select Title	Address: 123 Main Street, Anytown City: Schenectady   State: NY Country: USA   Zip Code: 12345	Office or Primary Phone: (568) 956-5623   Ext: Mobile: (565) 000-0000   Home: (646) 500-0000 Fax: (745) 646-4656 Email: Website: Include http:// or https://

Marketing Info  
History

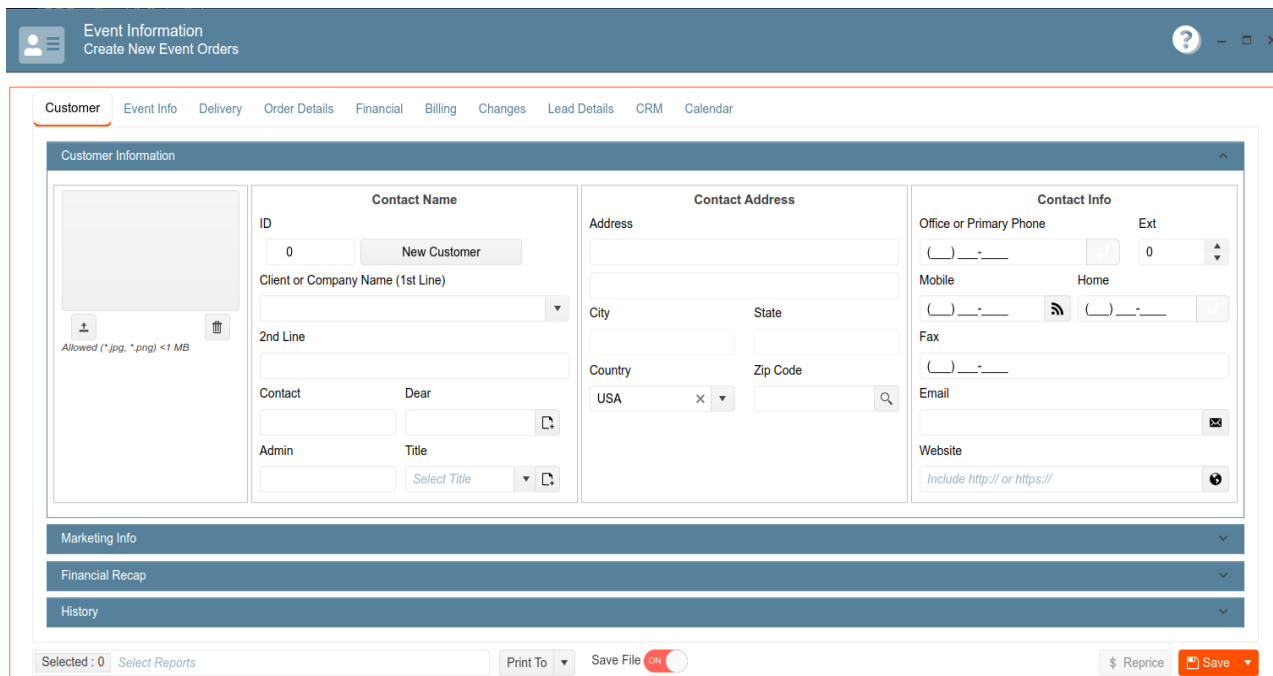
New Event | Save

# Event & Order Management

The event information screen houses the key details of each event, including the event date, time, location, guest count, order details, special requests, and any other necessary details for planning and executing the event.

## Creating a New Event

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Click on *Create New Events Orders*
  - Users can then select an existing customer, or enter a new customer
4. Complete all the required information
5. Once you have entered the required information click on Save




**TIP:** You can also create an event directly from the customer's file, click on the *New Event* button and the *Event Information* window will appear.

## Copy an Event

You can also create an event from an existing one.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Select the event by checking the box next to the pencil icon
5. Click on the down arrow next to the *New Entry* button
6. From the drop down menu, select copy event
7. The *Copy Event Process Window* will pop up
8. Update the billing information
9. Click on *Process Copy*.

 Copy Event Process Window  
Copy Past Event Information ? x

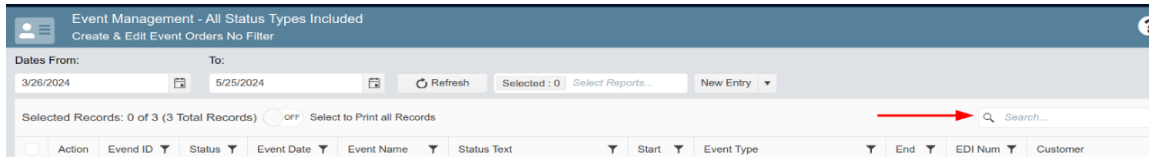
Customer Billing Information		Filter Departments to Copy
<b>Existing Customer</b> <input type="text" value="Krissia Castro test 5"/>	<b>New Event Name</b> <input type="text" value="Test for user manual"/>	<input type="checkbox"/> Menu
<b>Existing Contact</b> <input type="text" value="Krissia Castro"/>	<b>New Customer</b> <input style="border: 1px solid #ccc; border-radius: 4px; padding: 2px 5px;" type="text" value="Krissia Castro test 5"/> <span>x</span> <span>v</span>	<input type="checkbox"/> Beverage
<b>Existing Status</b> <input type="text" value="Confirmed - Deposit Pend."/>	<b>New Status</b> <input style="border: 1px solid #ccc; border-radius: 4px; padding: 2px 5px;" type="text" value="Confirmed - Deposit Pend."/> <span>v</span>	<input type="checkbox"/> Equipment
<b>Existing Date</b> <input type="text" value="Friday, May 3, 2024"/>	<b>New Event Date</b> <input style="border: 1px solid #ccc; border-radius: 4px; padding: 2px 5px;" type="text" value="5/3/2024"/> <span>📅</span> <span>🔄 Recurrence</span>	<input type="checkbox"/> Staff
		<input type="checkbox"/> Miscellaneous

📄 Process Copy v

## Searching for Events

To quickly find an event, you can choose any of the following options:

- A.
1. Click on the *Sales and Marketing* section located on the left panel
  2. Click on *Events & Order Management*, the *Event Management* window will show
  3. On the search bar located on the upper right corner you can look for you event by name, date or event ID.



- B. You can also look at the *Event Calendar* by double clicking on the calendar located on the top of the screen next to Elecate's logo.

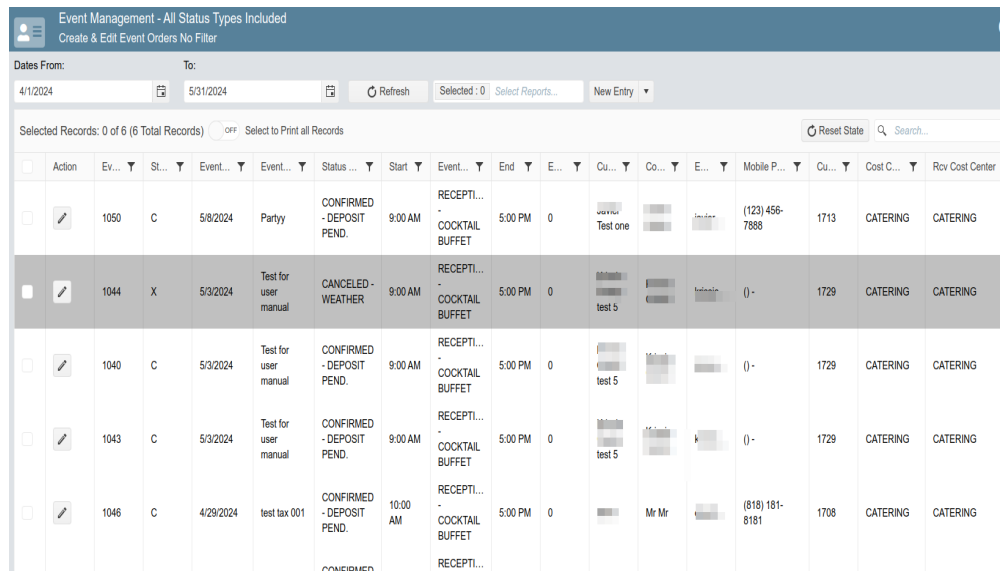


- C.
1. Click on the *Sales and Marketing* section located on the left panel
  2. Click on *Events & Order Management*, the *Event Management* window will show
  3. Select *Search for Event by EDI Number* and enter the EDI number on the pop up screen.

## Editing an Existing Event

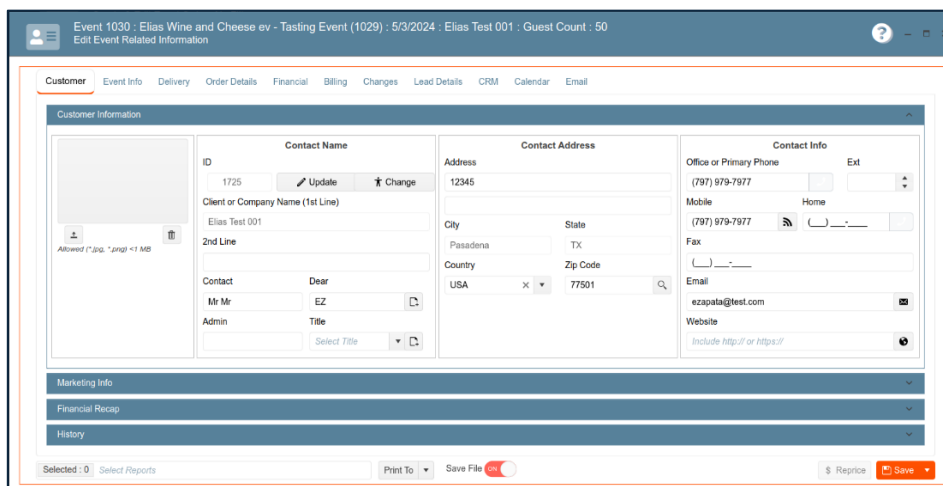
Once you have one or more events entered, you can make changes as needed:

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included*. This section should look like the picture below.



Action	Ev...	St...	Event...	Event...	Status...	Start	Event...	End	E...	Cu...	Co...	E...	Mobile P...	Cu...	Cost C...	Rev Cost Center
	1050	C	5/8/2024	Party	CONFIRMED - DEPOSIT PEND.	9:00 AM	RECEPTI... - COCKTAIL BUFFET	5:00 PM	0	Test one			(123) 456-7888	1713	CATERING	CATERING
	1044	X	5/3/2024	Test for user manual	CANCELED - WEATHER	9:00 AM	RECEPTI... - COCKTAIL BUFFET	5:00 PM	0	test 5			()-	1729	CATERING	CATERING
	1040	C	5/3/2024	Test for user manual	CONFIRMED - DEPOSIT PEND.	9:00 AM	RECEPTI... - COCKTAIL BUFFET	5:00 PM	0	test 5			()-	1729	CATERING	CATERING
	1043	C	5/3/2024	Test for user manual	CONFIRMED - DEPOSIT PEND.	9:00 AM	RECEPTI... - COCKTAIL BUFFET	5:00 PM	0	test 5			()-	1729	CATERING	CATERING
	1046	C	4/29/2024	test tax 001	CONFIRMED - DEPOSIT PEND.	10:00 AM	RECEPTI... - COCKTAIL BUFFET	5:00 PM	0		Mr Mr		(818) 181-8181	1708	CATERING	CATERING

4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Make the changes and click on *Save*



Event 1030: Elias Wine and Cheese ev - Tasting Event (1029) : 5/3/2024 : Elias Test 001 : Guest Count : 50

Customer Information

<p>ID: 1725  </p> <p>Client or Company Name (1st Line): Elias Test 001</p> <p>2nd Line:</p> <p>Contact: Dear Mr Mr </p> <p>Admin: Title </p>	<p>Address: 12345</p> <p>City: Pasadena State: TX</p> <p>Country: USA Zip Code: 77501</p>	<p>Contact Info</p> <p>Office or Primary Phone: (797) 979-7977 Ext: </p> <p>Mobile: (797) 979-7977 Home: </p> <p>Fax: </p> <p>Email: ezapata@test.com </p> <p>Website: </p>
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Marketing Info

Financial Recap

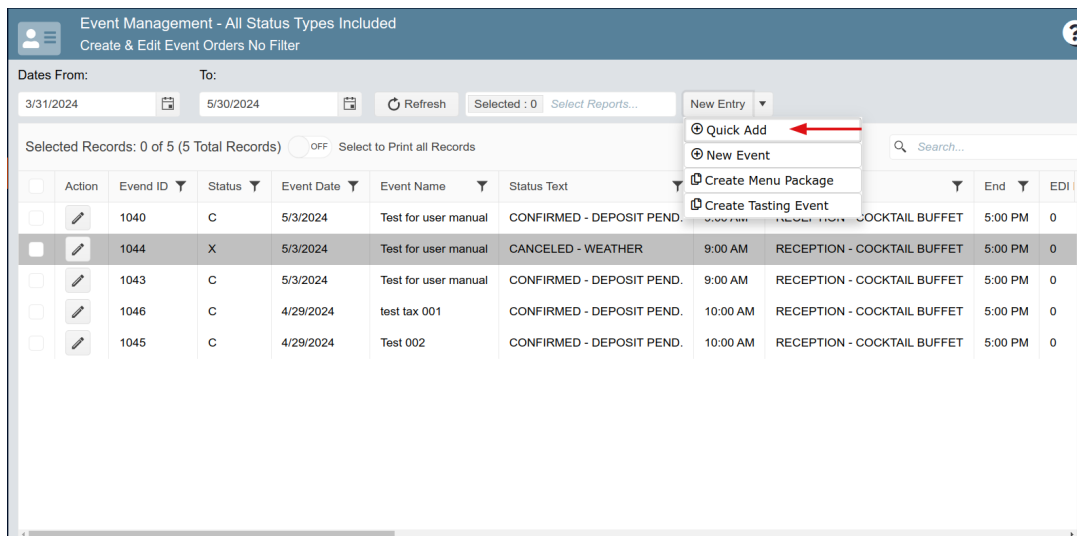
History

Selected: 0

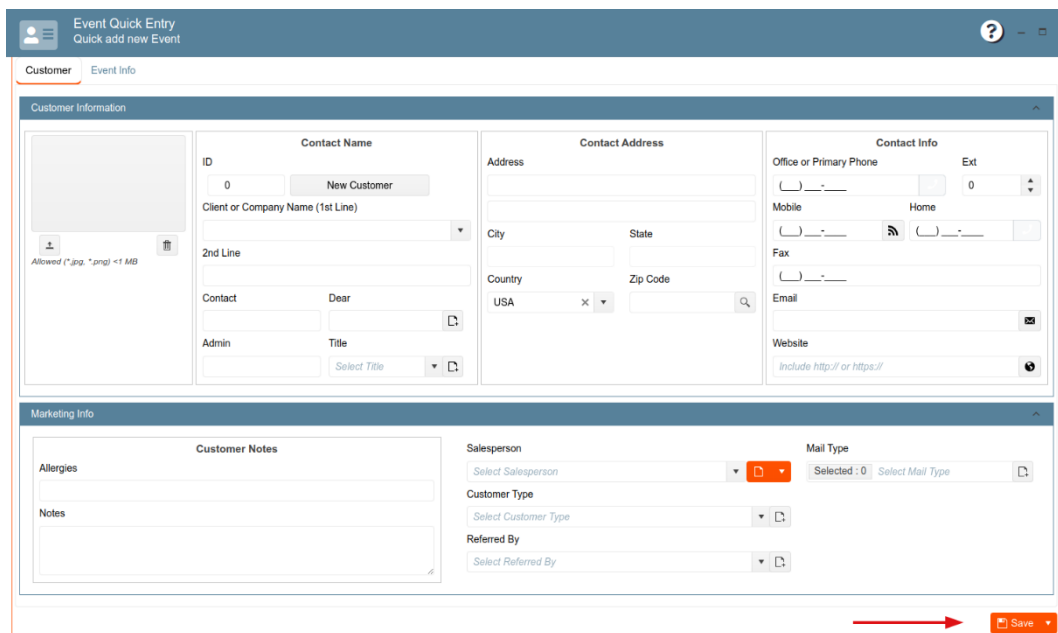
## Adding a Quick Event

To quickly capture the basic details of a new event, users can use the Quick Event feature.

1. Click on the *Sales and Marketing* section located on the left pane
2. Click on *Events & Order Management*.
3. Click on *Event Management-All Status Types Included*
4. Click on the down arrow next to the *New Entry* button
5. From the drop-down menu, select *Quick Add*



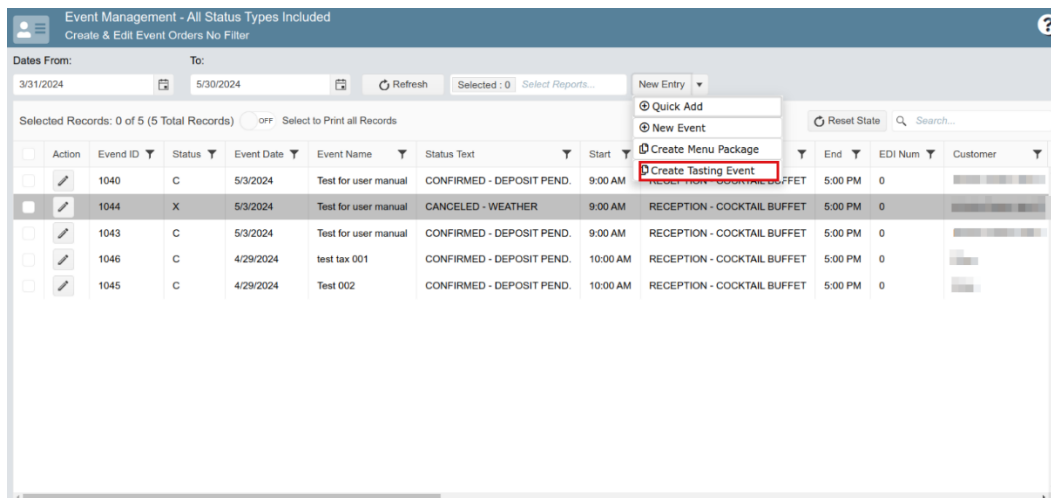
6. A pop-up window will appear
7. Once you have entered all the information, click on *Save*



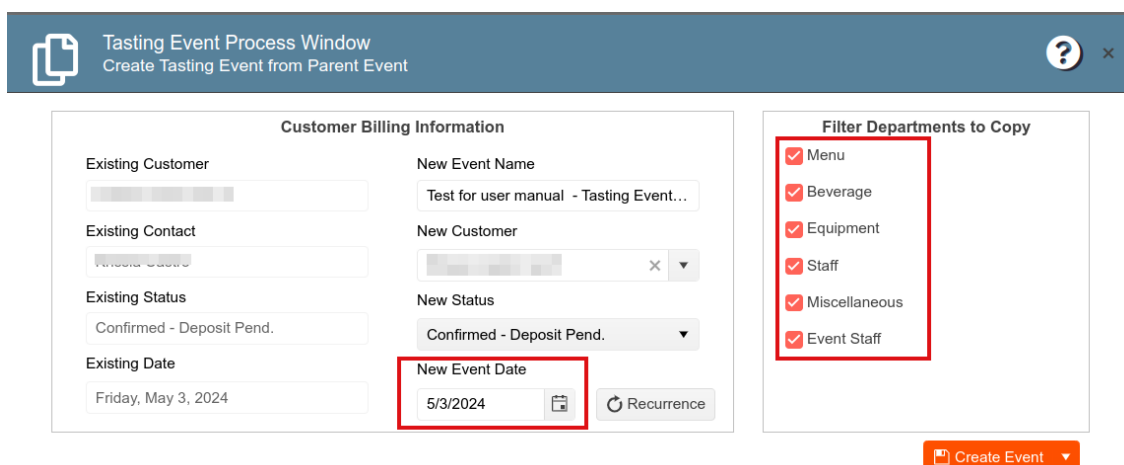
## Creating a Tasting Event from an Already Existing Event

To create a tasting event from the parent event, copying over the relevant details, follow the instructions below:

1. Click on the *Sales and Marketing* section located on the left pane
2. Click on *Events & Order Management*
3. Click on *Event Management-All Status Types Included*
4. Click on the down arrow next to the *New Entry* button
5. From the drop-down menu, select *Create Tasting Event*



6. Pop-Up will appear
7. Make sure to change the date before the main date
8. Select the departments you want to copy from the parent event to the tasting event. Uncheck the box for orders you do not wish to copy over.
9. When you have entered all the information, click on *Create Event*



**Customer Billing Information**

Existing Customer: [Redacted]

Existing Contact: [Redacted]

Existing Status: Confirmed - Deposit Pend.

Existing Date: Friday, May 3, 2024

New Event Name: Test for user manual - Tasting Event...

New Customer: [Redacted]

New Status: Confirmed - Deposit Pend.

New Event Date: 5/3/2024 [Calendar Icon] [Recurrence]

**Filter Departments to Copy**

- Menu
- Beverage
- Equipment
- Staff
- Miscellaneous
- Event Staff

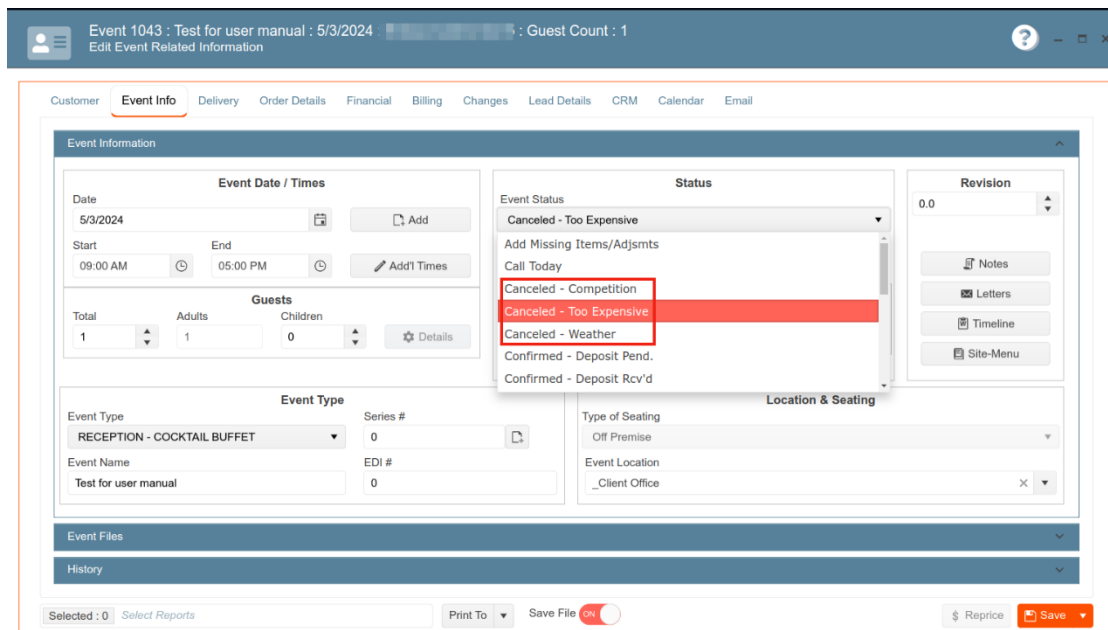
Create Event [Dropdown Arrow]



## Canceling an Event

To cancel an event, follow the steps below:

1. Click on the *Sales and Marketing* section located on the left pane
2. Click on *Events & Order Management*
3. Click on *Event Management-All Status Types Included*
4. Select the event you want to cancel by clicking on the pencil button or double clicking on the event row
5. Select the Event Info Tab, Go to the Event Status
6. Click on the drop down and select from the list of cancellation reasons. Next, a pop-up will appear. Please provide additional context for the cancellation.
7. Once you have finished click on *Save*.



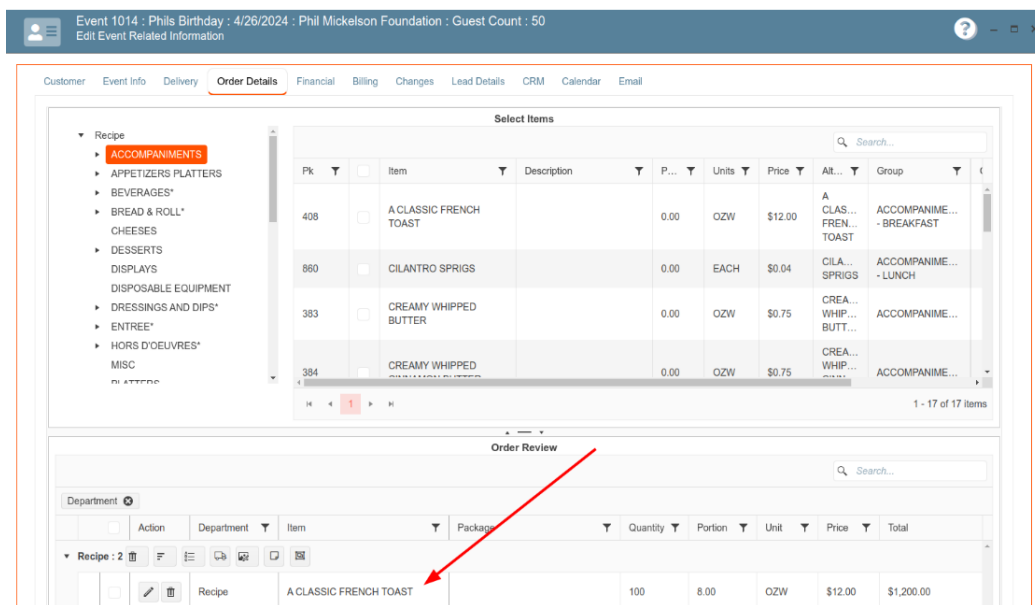
The screenshot displays the 'Event Info' tab for 'Event 1043 : Test for user manual : 5/3/2024'. The 'Event Status' dropdown menu is open, showing options: 'Canceled - Too Expensive', 'Canceled - Competition', 'Canceled - Too Expensive', 'Canceled - Weather', 'Confirmed - Deposit Pend.', and 'Confirmed - Deposit Rcv'd'. The 'Canceled - Too Expensive' option is highlighted in red. Other visible fields include 'Event Date / Times' (5/3/2024, 09:00 AM to 05:00 PM), 'Guests' (Total: 1, Adults: 1, Children: 0), 'Event Type' (RECEPTION - COCKTAIL BUFFET), and 'Event Name' (Test for user manual).

## Proposal Creation Process

### Adding items from the *Recipe Department*

From the event window you can add items in different categories, which are called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Recipe* department and navigate through the various options. The department details will appear in *Select Items*.
7. Add the desired item by double-clicking on it, an *Add/Edit* window will pop up
8. Review *Quantity, Description*, and other details
9. Click on save and close
10. The new items will appear under *Order Review*.



The screenshot shows the 'Order Details' tab in the Elecate software. The 'Recipe' department is selected, and the 'Select Items' table is visible. The table contains the following items:

Pk	Item	Description	P...	Units	Price	Alt...	Group
408	A CLASSIC FRENCH TOAST		0.00	OZW	\$12.00	A CLAS... FREN... TOAST	ACCOMPANIME... - BREAKFAST
860	CILANTRO SPRIGS		0.00	EACH	\$0.04	CILA... SPRIGS	ACCOMPANIME... - LUNCH
383	CREAMY WHIPPED BUTTER		0.00	OZW	\$0.75	CREA... WHIP... BUTT...	ACCOMPANIME...
384	CREAMY WHIPPED BUTTER		0.00	OZW	\$0.75	CREA... WHIP... BUTT...	ACCOMPANIME...

The 'Order Review' table below shows the selected item:

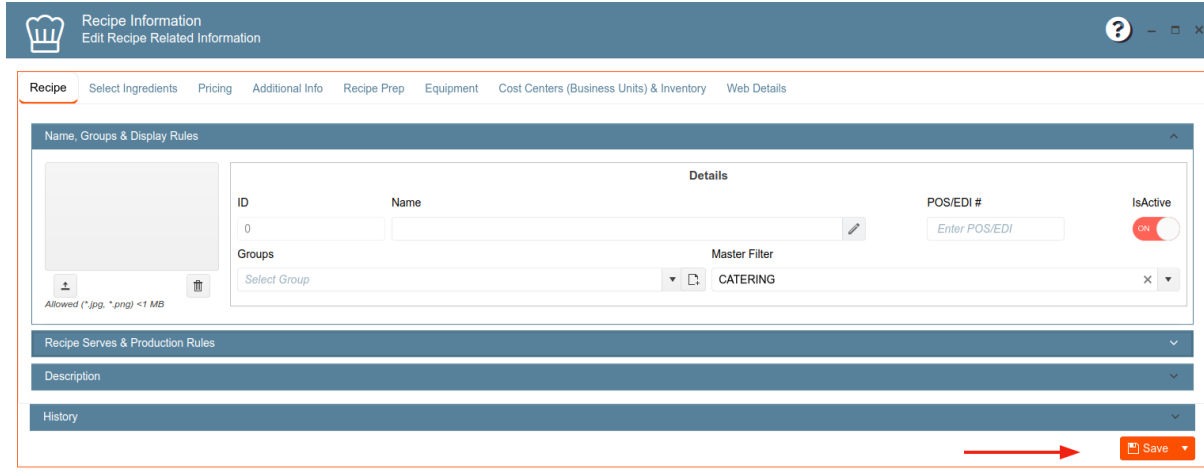
Action	Department	Item	Package	Quantity	Portion	Unit	Price	Total
	Recipe	A CLASSIC FRENCH TOAST		100	8.00	OZW	\$12.00	\$1,200.00

**Important:** To save items, the event entry must have been completed and saved first.

## On the Fly Recipes

To quickly add a recipe that isn't in your database, you can use the on-the-fly recipe tool.

1. Click on Data Items section located on the left panel
2. Select *Food Management* and the *Food Department* window will appear
3. Select Recipe Management (On the fly)
4. Click on the New Entry button, and the Recipe Information window displays
5. Complete the fields and click save



Recipe Information  
Edit Recipe Related Information

Recipe | Select Ingredients | Pricing | Additional Info | Recipe Prep | Equipment | Cost Centers (Business Units) & Inventory | Web Details

Name, Groups & Display Rules

Details

ID: 0 | Name: | POS/EDI #: Enter POS/EDI | IsActive: ON

Groups: Select Group | Master Filter: CATERING

Recipe Serves & Production Rules

Description

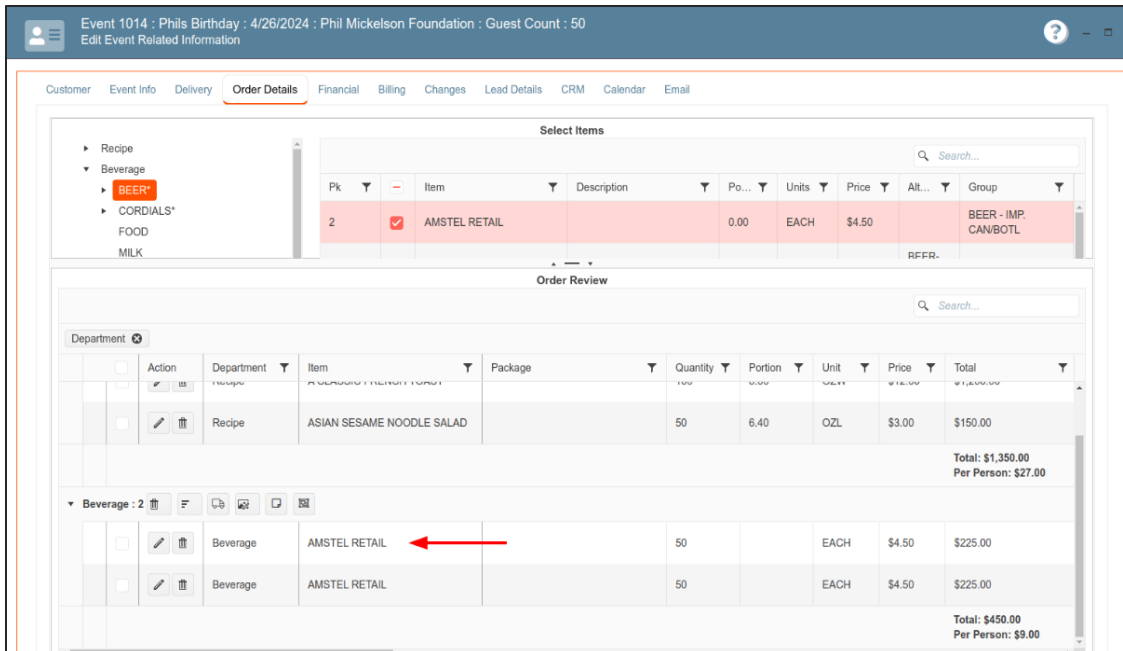
History

Save

## Adding Items from the *Beverage Department*

From the event window you can add items in different categories, called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Beverage* department and navigate through the various options. The department details will appear in *Select Items*.
7. Add the desired item by double-clicking on it, an *Add/Edit* window will pop up
8. Review *Quantity*, *Description*, and other details
9. Click on save and close
10. The new items will appear under *Order Review*



The screenshot displays the Elecate software interface for an event titled "Event 1014 : Phil's Birthday : 4/26/2024 : Phil Mickelson Foundation : Guest Count : 50". The "Order Details" tab is active, showing a "Select Items" section with a table of items. The "Beverage" department is selected, and "AMSTEL RETAIL" is highlighted. Below this, the "Order Review" section shows a table of items added to the order, with "AMSTEL RETAIL" items highlighted and a red arrow pointing to them.

Pk	Item	Description	Po...	Units	Price	Alt...	Group
2	AMSTEL RETAIL		0.00	EACH	\$4.50		BEER - IMP CAN/BOTL

Action	Department	Item	Package	Quantity	Portion	Unit	Price	Total
	Recipe	ASIAN SESAME NOODLE SALAD		50	6.40	OZL	\$3.00	\$150.00
								Total: \$1,350.00 Per Person: \$27.00
	Beverage	AMSTEL RETAIL		50		EACH	\$4.50	\$225.00
	Beverage	AMSTEL RETAIL		50		EACH	\$4.50	\$225.00
								Total: \$450.00 Per Person: \$9.00

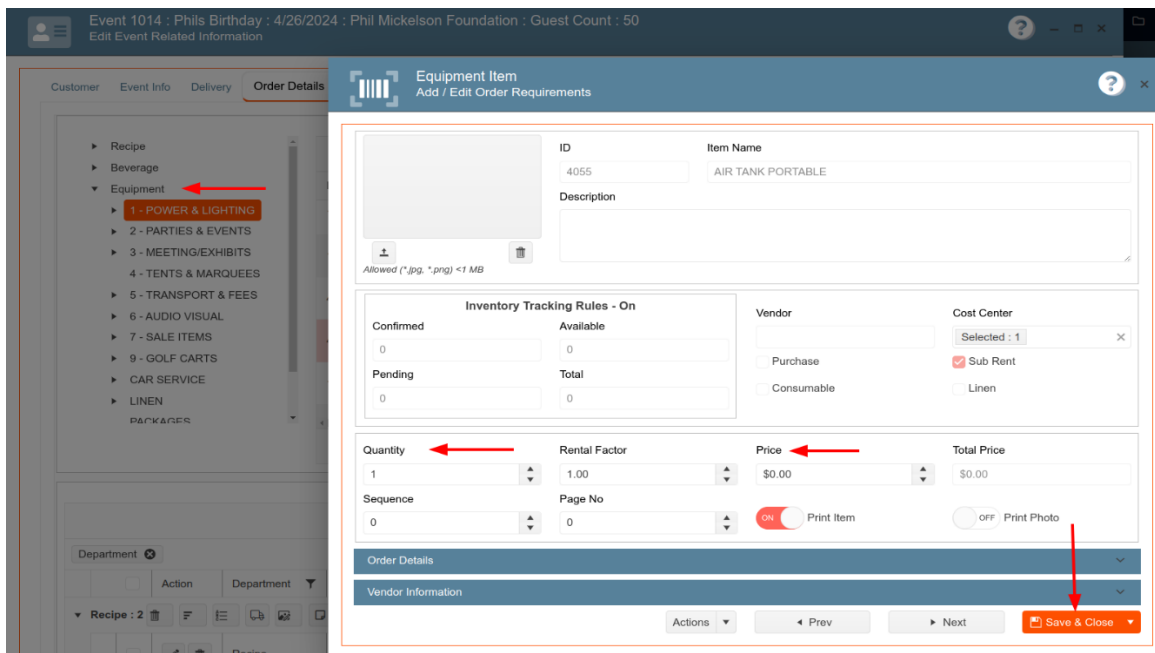
**Important:** To save items, the event entry must have been completed and saved first.

## Adding Items from the *Equipment* Department

From the event window you can add items in different categories, called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Equipment* department and navigate through the various options. The department details will appear in *Select Items*.
7. Add the desired item by double-clicking on it, an *Add/Edit* window will pop up
8. Review *Quantity*, *Description*, and other details
9. Click on save and close
10. The new items will appear under *Order Review*

**Important:** To save items, the event entry must have been completed and saved first.



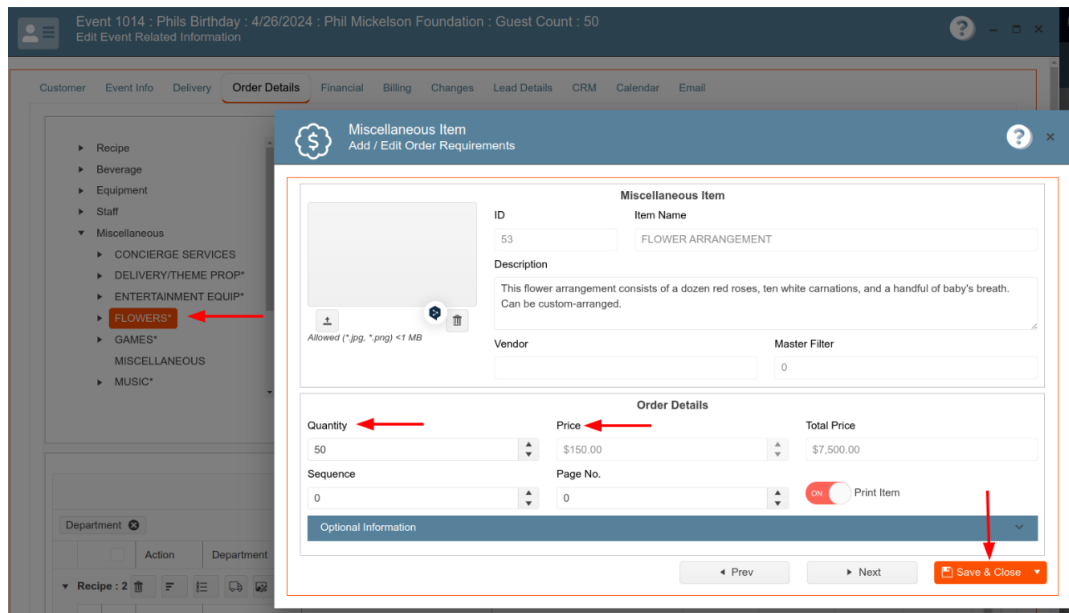
The screenshot shows the 'Equipment Item' window with the following details:

- ID:** 4055
- Item Name:** AIR TANK PORTABLE
- Description:** (Empty text area)
- Inventory Tracking Rules - On:**
  - Confirmed: 0
  - Available: 0
  - Pending: 0
  - Total: 0
- Vendor:** (Dropdown menu)
- Cost Center:** Selected: 1
- Sub Rent:**
- Linen:**
- Consumable:**
- Quantity:** 1
- Rental Factor:** 1.00
- Price:** \$0.00
- Total Price:** \$0.00
- Sequence:** 0
- Page No:** 0
- Print Item:**
- Print Photo:**
- Buttons:** Order Details, Vendor Information, Actions, Prev, Next, **Save & Close**

## Adding Items to the *Miscellaneous* Department

From the event window you can add items such as outside rentals, florals and third-party services in different categories, called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

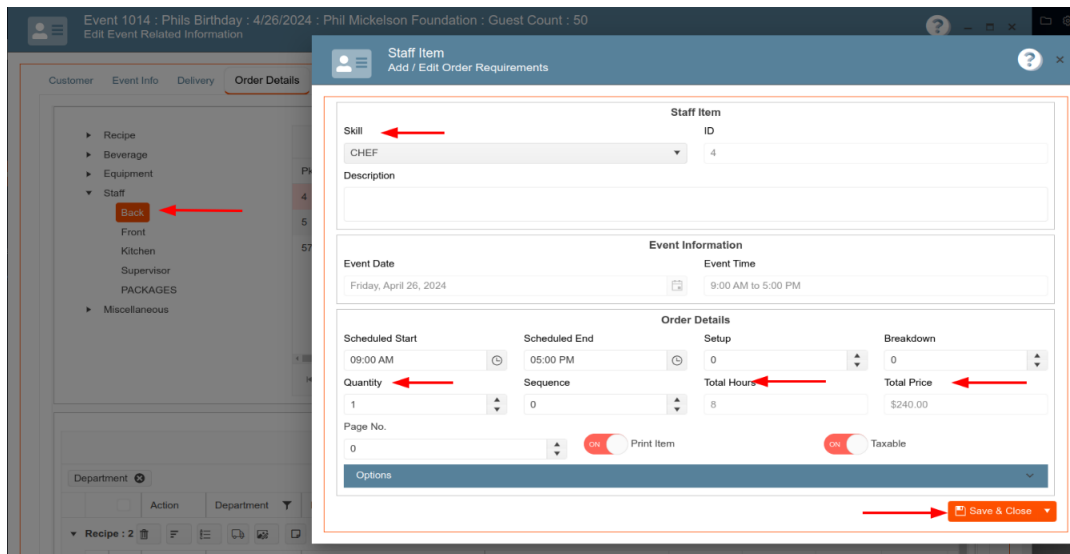
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Miscellaneous* department and navigate through the various options. The department details will appear in *Select Items*.
7. Add the desired item by double-clicking on it, an *Add/Edit* window will pop up
8. Review *Quantity*, *Description*, and other details
9. Click on save and close
10. The new items will appear under *Order Review*



## Requesting Staff in the *Staff* Department

From the event window you can add items in different categories, called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Staff* department and navigate through the various options. The department details will appear in *Select Items*.
7. Add the desired role by double-clicking on it, an *Add/Edit* window will pop up
8. Fill out the details such as price , skill, and quantity
9. Click on *Save* and close
10. The new roles will appear under *Order Review*



Event 1014 : Phils Birthday : 4/26/2024 : Phil Mickelson Foundation : Guest Count : 50  
Edit Event Related Information

Customer Event Info Delivery **Order Details**

- ▶ Recipe
- ▶ Beverage
- ▶ Equipment
- ▼ Staff
  - Back
  - Front
  - Kitchen
  - Supervisor
  - PACKAGES
  - ▶ Miscellaneous

Department

Action Department

Recipe : 2

**Staff Item**  
Add / Edit Order Requirements

**Staff Item**

Skill: CHEF ID: 4

Description:

**Event Information**

Event Date: Friday, April 26, 2024 Event Time: 9:00 AM to 5:00 PM

**Order Details**

Scheduled Start: 09:00 AM Scheduled End: 05:00 PM Setup: 0 Breakdown: 0

Quantity: 1 Sequence: 0 Total Hours: 8 Total Price: \$240.00

Page No.: 0

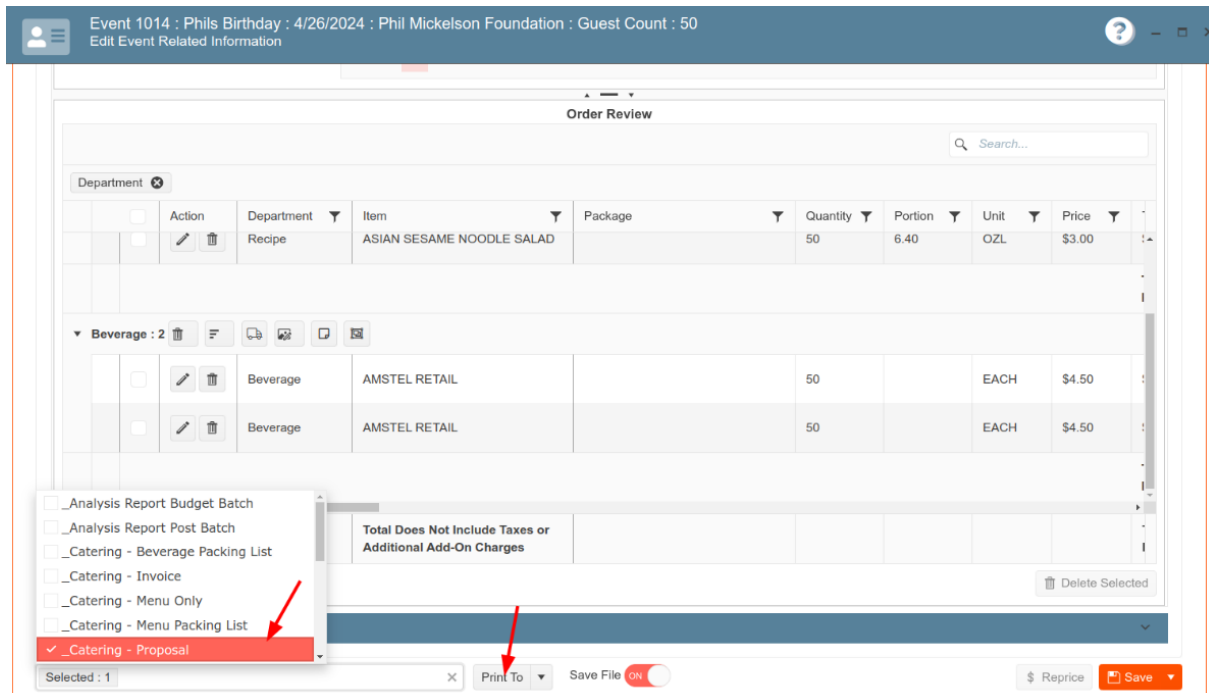
Print Item  Taxable

Options

Save & Close

## Printing Proposals

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the bottom of the window and look for the box that says *Select Reports*
6. Click into the box and select *Catering Proposal*. *This will work from any of the tabs*
7. Click on the down arrow next to the *Print to* button and select the preferred format
8. Elecate will generate the report.



Event 1014 : Phils Birthday : 4/26/2024 : Phil Mickelson Foundation : Guest Count : 50  
Edit Event Related Information

Order Review

Search...

Department	Action	Department	Item	Package	Quantity	Portion	Unit	Price
		Recipe	ASIAN SESAME NOODLE SALAD		50	6.40	OZL	\$3.00
▼ Beverage : 2								
		Beverage	AMSTEL RETAIL		50		EACH	\$4.50
		Beverage	AMSTEL RETAIL		50		EACH	\$4.50

Total Does Not Include Taxes or Additional Add-On Charges

Delete Selected

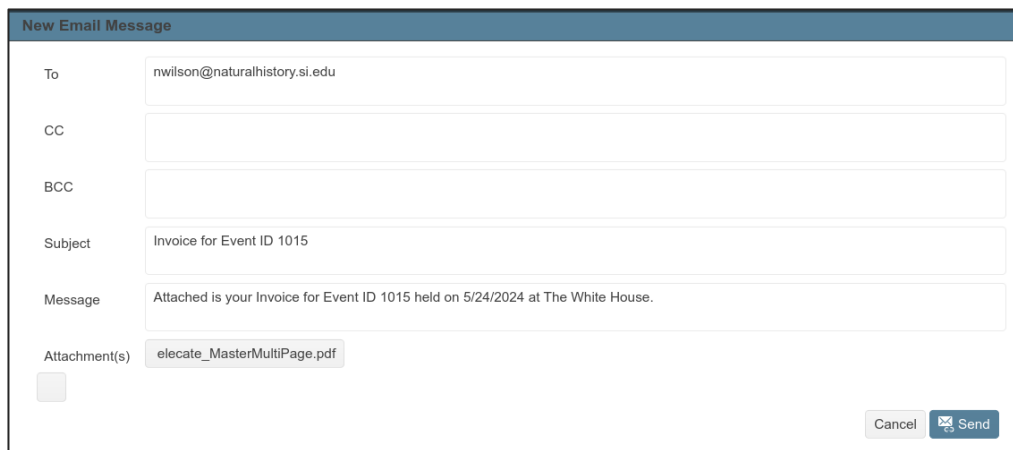
Selected : 1 Print To Save File  Reprice Save

\_Analysis Report Budget Batch  
 \_Analysis Report Post Batch  
 \_Catering - Beverage Packing List  
 \_Catering - Invoice  
 \_Catering - Menu Only  
 \_Catering - Menu Packing List  
 \_Catering - Proposal



## How to Email a Proposal

1. Users can send proposals to clients within the Elecate application by following the steps below: Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the bottom of the window and look for the box that says *Select Reports*
6. Click into the box and select *Catering Proposal*. *This will work from any tab.*
7. Click on the down arrow next to the *Print to* button and select *Send Email*, a *New Email Message* screen will pop up
8. Customize your message and click on *Send*.



The screenshot shows a 'New Email Message' form with the following fields and content:

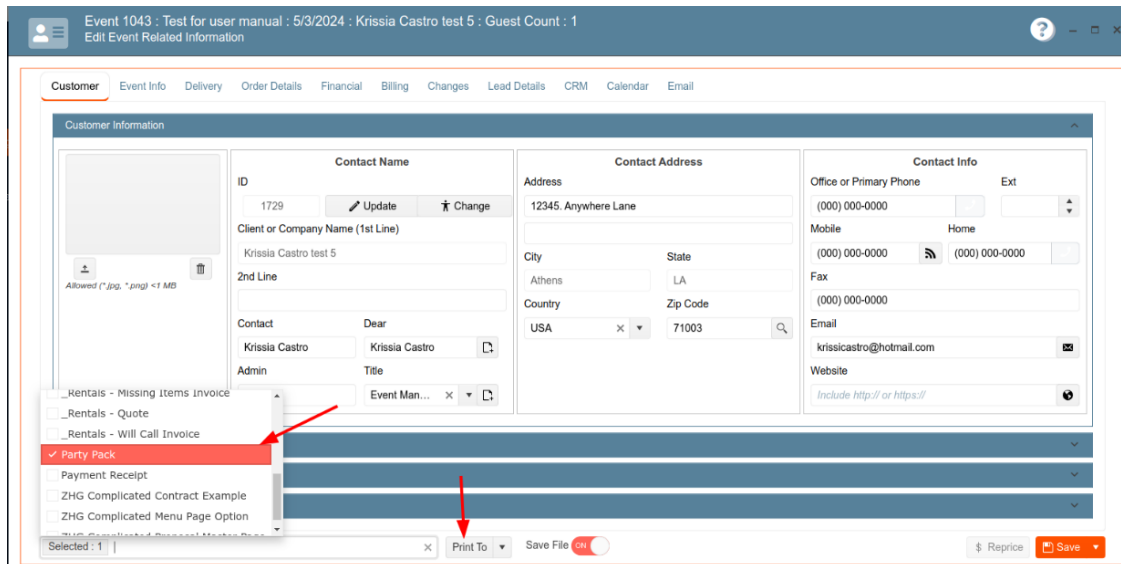
- To:** nwilson@naturalhistory.si.edu
- CC:** (empty)
- BCC:** (empty)
- Subject:** Invoice for Event ID 1015
- Message:** Attached is your Invoice for Event ID 1015 held on 5/24/2024 at The White House.
- Attachment(s):** elecate\_MasterMultiPage.pdf

At the bottom right, there are two buttons: 'Cancel' and 'Send' (with an envelope icon).

## Generate a Party Pack (BEO)

There are several types of reports that can be generated in Elecate. Below are the steps to generate a Party Pack (BEO)

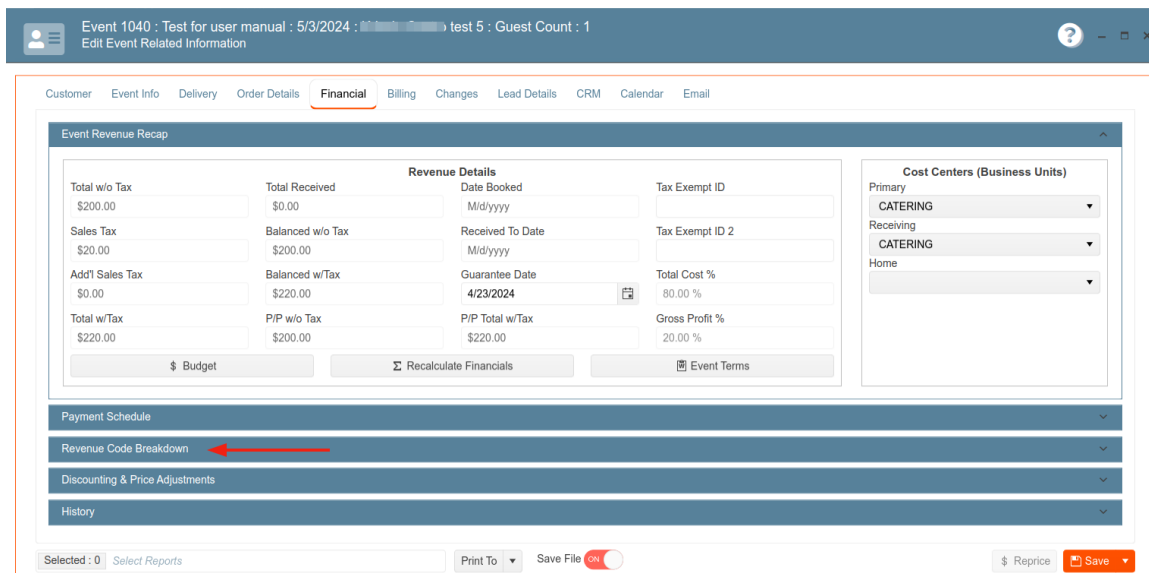
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the bottom of the window and look for the box that says *Select Reports*
6. Look for and check the box *Party Pack*
7. Click on the down arrow next to the *Print to* button and select the desired report
8. Elecate will generate the report.



## Entering Discounts

Below are the steps to discounting an event:

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Click on *Event Management-All Status Types Included*
4. Select the Event to which you want to apply the discount
5. Go to the *Financial* Tab
6. Go to the *Discount & Price Adjustments* section
7. In the *Disc Amt* column, enter the amount in dollars, the system will automatically show the percentage on the next column, called *Disc Pct*. Discounts can also be applied as a percentage, and the dollar amount will automatically calculate.
8. Once you applied the discount click on *Save Price Adjustments*
9. When you finish click on the *Save* button.



Event 1040 : Test for user manual : 5/3/2024 : test 5 : Guest Count : 1  
Edit Event Related Information

Customer Event Info Delivery Order Details **Financial** Billing Changes Lead Details CRM Calendar Email

**Event Revenue Recap**

Revenue Details		Tax Exempt ID	
Total w/o Tax	Total Received	Date Booked	Tax Exempt ID
\$200.00	\$0.00	Mid/yyyy	
Sales Tax	Balanced w/o Tax	Received To Date	Tax Exempt ID 2
\$20.00	\$200.00	Mid/yyyy	
Add'l Sales Tax	Balanced w/Tax	Guarantee Date	Total Cost %
\$0.00	\$220.00	4/23/2024	80.00 %
Total w/Tax	P/P w/o Tax	P/P Total w/Tax	Gross Profit %
\$220.00	\$200.00	\$220.00	20.00 %

Cost Centers (Business Units)  
Primary: CATERING  
Receiving: CATERING  
Home: Home

Payment Schedule  
Revenue Code Breakdown  
Discounting & Price Adjustments  
History

Selected: 0 Select Reports Print To Save File Reprice Save

## Creating a Menu Package

Sales users and administrators can create a grouping of recipes to be used repeatedly by following the steps below:

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*
3. Click on *Event Management-All Status Types Included*
4. Click on the down arrow next to the *New Entry* button
5. In the dropdown click on *Create Menu Package* option
6. A pop-up will appear.
7. Check the items and if everything is ok click on *Process Copy*

Copy Menu from Existing Event  
Create / Edit Menu from Existing Event
?

Menu Name Is Active

Favorite Wedding Menu

Event Type: RECEPTION - COCKTAIL BUFFET

Master Filter: CATERING

Rec ID	Recipe Name	Serves	Portion Size	Portion Unit	Cost	Sub Recipe	Scale	Print
430	*Chorizo* Corn Dumplings Vegan / GF	1	0.00	EACH	\$0.00	N	True	False
640	Accoutrements	1	0.00	EACH	\$0.00	N	True	False

1 - 2 of 2 items

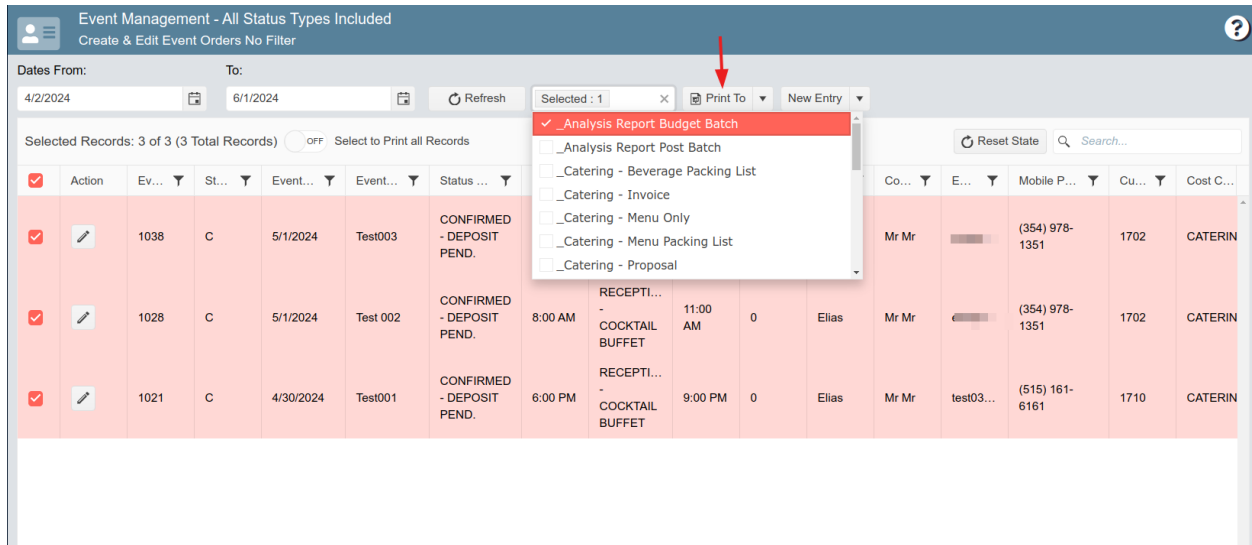
Search...

Process Copy

## Running Batch Reports

Below are the steps to generate reports for more than one event at the same time:

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*
3. Click on *Event Management-All Status Types Included*
4. Select all the events
5. Select a Report
6. In the under arrow next to *Print to* button select a format or preview
7. Click on *Print to*



The screenshot shows the 'Event Management - All Status Types Included' interface. At the top, there are date filters (4/2/2024 to 6/1/2024) and a 'Print To' button. A dropdown menu is open, showing various report options. The table below contains three records, all of which are selected (indicated by red checkmarks in the 'Action' column).

Action	Ev...	St...	Event...	Event...	Status ...	Co...	E...	Mobile P...	Cu...	Cost C...
<input checked="" type="checkbox"/>	1038	C	5/1/2024	Test003	CONFIRMED - DEPOSIT PEND.	Mr Mr		(354) 978-1351	1702	CATERIN
<input checked="" type="checkbox"/>	1028	C	5/1/2024	Test 002	CONFIRMED - DEPOSIT PEND.	Mr Mr		(354) 978-1351	1702	CATERIN
<input checked="" type="checkbox"/>	1021	C	4/30/2024	Test001	CONFIRMED - DEPOSIT PEND.	Mr Mr	test03...	(515) 161-6161	1710	CATERIN

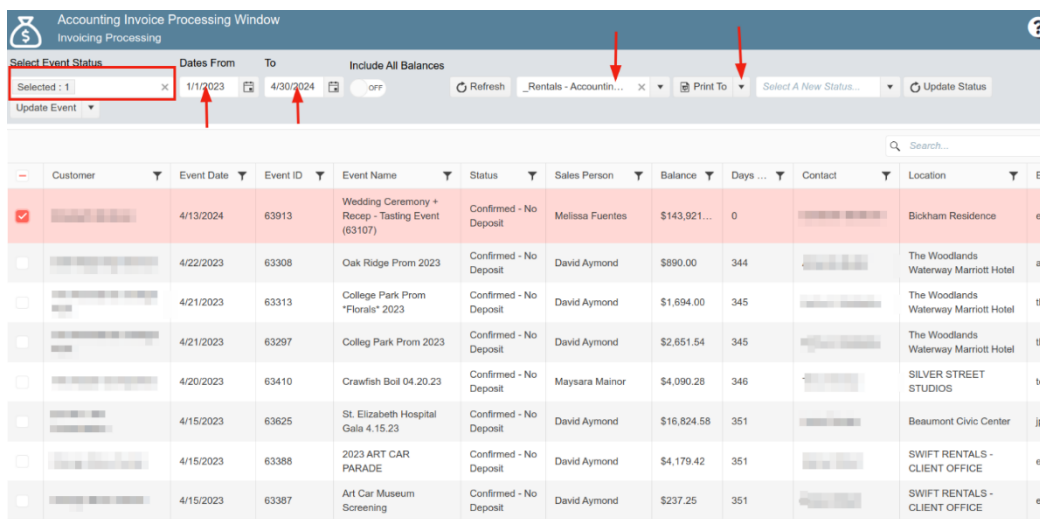
# Finance & Accounting



## Generating an Invoice

In this section you can create a formal document outlining the cost details for an event

1. Click on *Finance & Accounting* located in the side panel
2. Select *Accounting Tools*
3. Click on *Accounting Invoice Processing Window*
4. Select the *Event Status* for the events that you would like to view (e.g. Confirmed)
5. Set the date range and click *Refresh*
6. Select the report you want to generate. (e.g. Accounting Invoice)
7. Select the event Click on the down arrow next to the *Print to* button select the preferred format.



## Entering Customer Tax Exempt Information and Certificate

1. Go to *Finance and Accounting*
2. Select *Customer Financials* twice
3. From the menu, select *Customer Financial Management*
4. Choose the customer you would like to edit by selecting the pencil icon or by double clicking on it
5. Go to *Certificates* tab
6. Click on *Add*
7. Write the Certificate Number
8. Choose a *State*
9. Enter the *Effective date* when the certificate is valid
10. Upload an attachment by Choosing a file
11. At the dropdown choose the *File Type*
12. In the dropdown called *Preview*, save your work.

# Production





# Production Reporting

Below you will find instructions for running and printing production reports.

## Production Reports

1. Select the *Production* section located on the left pannel
2. Select *Production Reporting*
3. Click on *Production Reports* and the *Production Reporting* window appears
4. Look for *the* desired report and click on it
5. Choose a date range
6. Select the desired report
7. Click on *Refresh*
8. Select the event from which you need the report
9. In the *Print to* down arrow, you can select the format you prefer or downloading
  - The available formats are:
    - Preview
    - PDF
    - Excel
    - CSV
    - Word
    - PowerPoint
    - Send Email
10. Elecate will generate the report using the selected format.

Equipment Requirements Reporting by Delivery Dates										
Select Default or Custom Reports										
Delivery Date From:		To:								
1/2/2023		5/25/2024		Refresh	Selected : 1					
Selected Records: 0 of 2 (2 Total Records) <input type="radio"/> OFF Select to Print all Records										Search...
<input type="checkbox"/>	Equip ID	Item Name	Description	Quan...	Group	Equip Location	Event ID	Costcen...	Status	Event Date
<input type="checkbox"/>	13030	ANTIQUE GOLD IRIDESCENT SATIN 120" ROUND CLOTH		10	IRIDESCENT SATIN	Warehouse	1001	CATERING	C	12/25/2023
<input type="checkbox"/>	11501	BENGLINE BURGUNDY TABLE RUNNER		2	ORGANZA	A Warehouse	1001	CATERING	C	12/25/2023

# Data Items



# Food Management

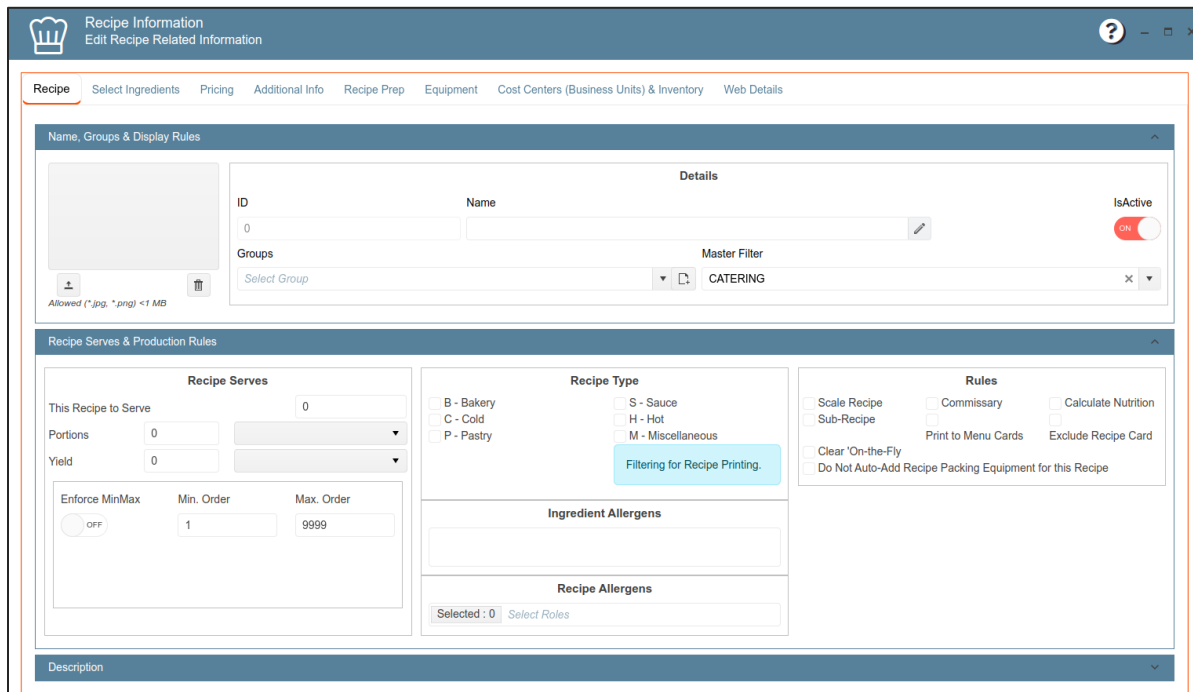
In the food management section, you can make changes to your recipes, ingredients, and menus.

## Adding Recipes

In this section you can create recipes that can be used across events.

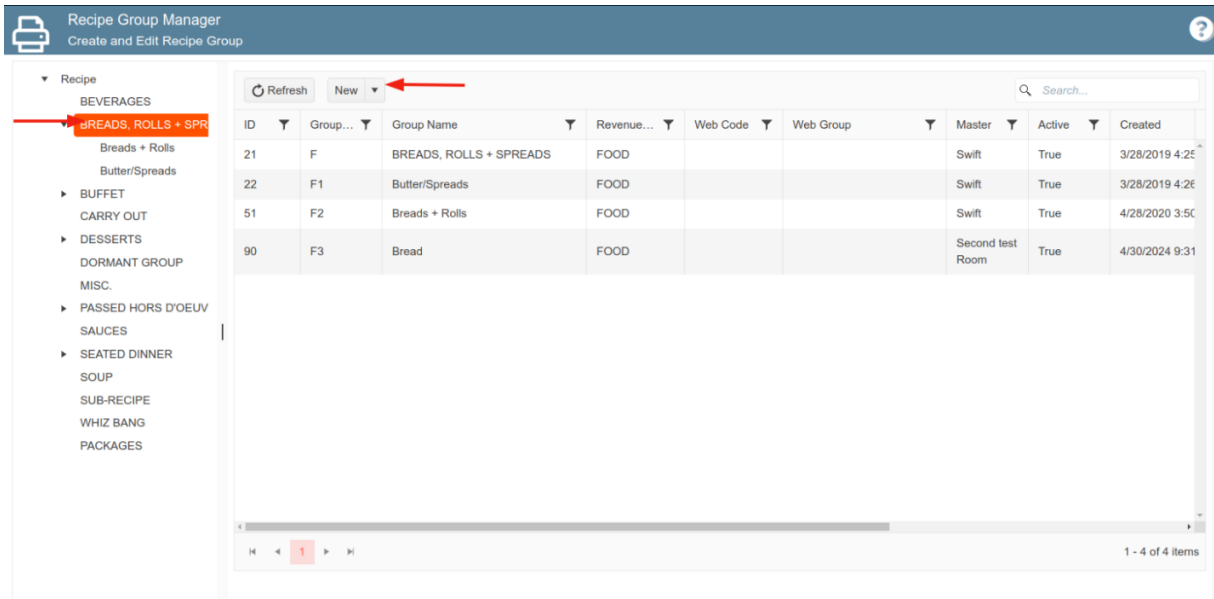
1. Click on the *Data Items* section located on the left pannel
2. Select *Food Management*. The *Food Department* window appears
3. Click on *Production Reports* and the *Production Reporting* window appears
4. From the menu, select *Recipe Management (All Items)*
5. Click on *New Entry*
4. The recipe information window will pop up, from there you can:
  - a. Name the recipe\*
  - b. Select a *Group* for the recipe\*
  - c. Assign a *Master Filter*\*
  - d. Set the *Portions*\*
  - e. Set the *Yield*\*
6. Click on *Save*.

\* All these fields are required to save changes successfully.



## Creating Recipe Groups

1. Click on the *Data Items* section located on the left pannel
2. Select *Food Management* and the *Food Department* window appears
3. From the menu, select *Recipe Group Management*
4. Select the main recipe category
5. Click on *New*



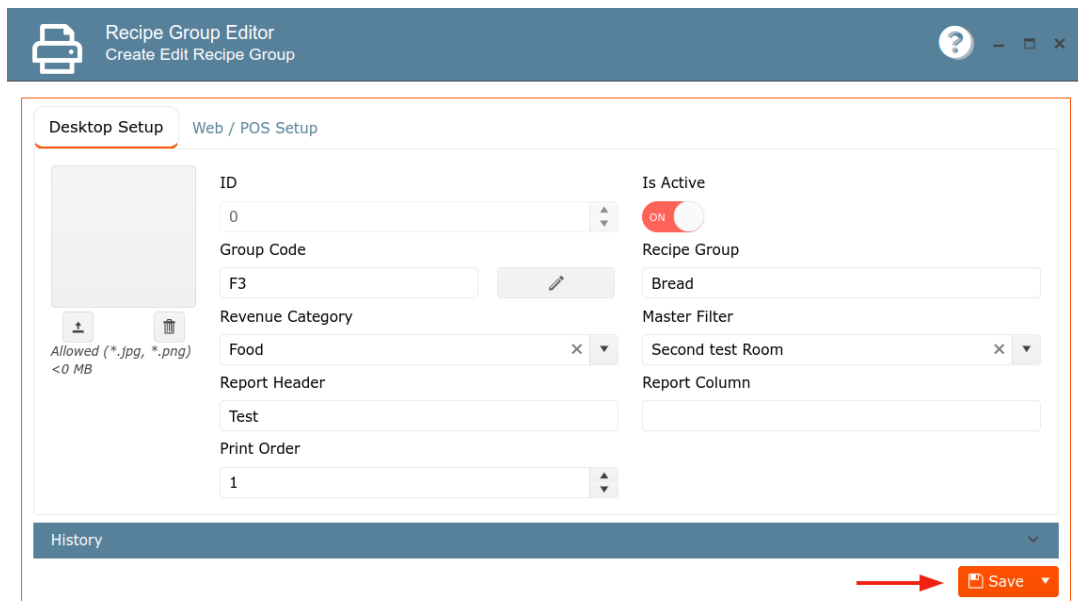
Recipe Group Manager  
Create and Edit Recipe Group

Recipe  
BEVERAGES  
BREADS, ROLLS + SPREADS  
Breads + Rolls  
Butter/Spreads  
BUFFET  
CARRY OUT  
DESSERTS  
DORMANT GROUP  
MISC.  
PASSED HORS D'OEUVRE  
SAUCES  
SEATED DINNER  
SOUP  
SUB-RECIPE  
WHIZ BANG  
PACKAGES

ID	Group...	Group Name	Revenue...	Web Code	Web Group	Master	Active	Created
21	F	BREADS, ROLLS + SPREADS	FOOD			Swift	True	3/28/2019 4:26
22	F1	Butter/Spreads	FOOD			Swift	True	3/28/2019 4:26
51	F2	Breads + Rolls	FOOD			Swift	True	4/28/2020 3:50
90	F3	Bread	FOOD			Second test Room	True	4/30/2024 9:31

1 - 4 of 4 items

6. The *Recipe Group Editor* will pop-up, from there you can enter/update all necessary information
7. Once you're done, click on *Save*.



Recipe Group Editor  
Create Edit Recipe Group

Desktop Setup Web / POS Setup

ID  
 Group Code  
 Revenue Category  
 Report Header  
 Print Order

Is Active  
 Recipe Group  
 Master Filter  
 Report Column

Allowed (\*.jpg, \*.png) <0 MB

History

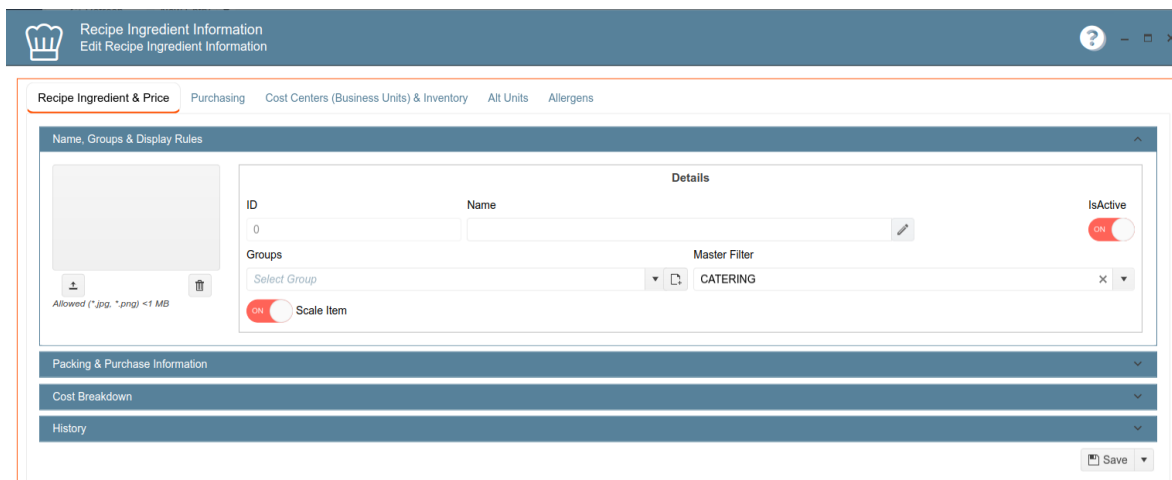
Save

## Deactivating Recipes

1. Click on *Data Items* in the side pane
2. Select *Food Management*
3. Click on *Recipe Management (All Items)*
4. Select the recipe you want to deactivate by clicking on the pencil icon or by double clicking on it
5. Turn off the *Is Active* switch
6. Click on *Save*.

## Adding a New Ingredient

1. Click on *Data Items* on the side pane
2. Click on *Food Management*
3. Click on *Ingredient Management (All Items)*
4. Click on the *New Entry* button
5. A pop-up window will appear
6. Name the ingredient\*
7. Assign the group\*
8. Once you enter all the required data click on *Save*.



Recipe Ingredient Information  
Edit Recipe Ingredient Information

Recipe Ingredient & Price | Purchasing | Cost Centers (Business Units) & Inventory | Alt Units | Allergens

Name, Groups & Display Rules

Details

ID: 0 | Name: | Is Active:

Groups: Select Group | Master Filter: CATERING

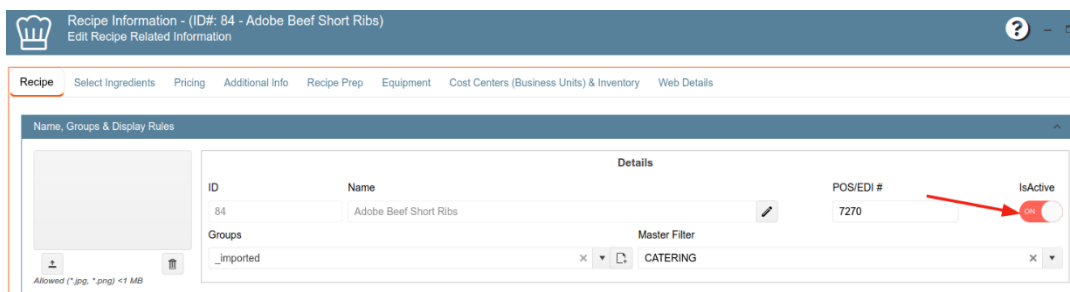
Scale Item

Packing & Purchase Information

Cost Breakdown

History

Save



Recipe Information - (ID#: 84 - Adobe Beef Short Ribs)  
Edit Recipe Related Information

Recipe | Select Ingredients | Pricing | Additional Info | Recipe Prep | Equipment | Cost Centers (Business Units) & Inventory | Web Details

Name, Groups & Display Rules

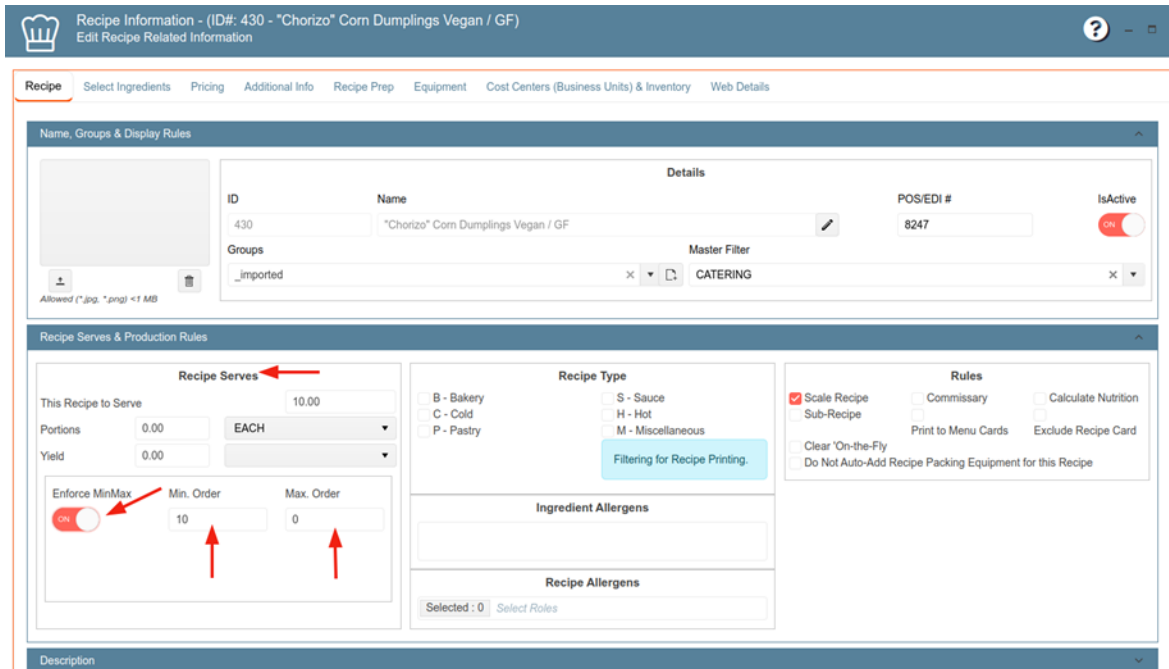
Details

ID: 84 | Name: Adobe Beef Short Ribs | POS/EDI #: 7270 | Is Active:

Groups: \_imported | Master Filter: CATERING

## Setting Recipe Minimums and Maximums

1. Click on *Data Items* on the side pane
2. Click on *Food Management*
3. Click on *Recipe Mangement (All Items)*
4. Select the recipe you want
5. In the Recipe Serves part turn on the switch name *Enforce Minmax*
6. Set the Min Order and Max Order
7. Once you Made all the changes click on *Save*.



The screenshot displays the 'Recipe Information' page for 'Chorizo' Corn Dumplings Vegan / GF. The 'Recipe Serves & Production Rules' section is expanded, showing the following details:

- Recipe Serves:** 'This Recipe to Serve' is set to 10.00. 'Portions' is 0.00 and 'Yield' is 0.00. The unit is set to 'EACH'.
- Enforce MinMax:** A toggle switch is turned ON (indicated by a red arrow).
- Min. Order:** Set to 10 (indicated by a red arrow).
- Max. Order:** Set to 0 (indicated by a red arrow).
- Recipe Type:** Includes options for Bakery, Cold, Pastry, Sauce, Hot, and Miscellaneous.
- Rules:** Includes options for Scale Recipe, Sub-Recipe, Commissary, Calculate Nutrition, Print to Menu Cards, Exclude Recipe Card, Clear 'On-the-Fly', and Do Not Auto-Add Recipe Packing Equipment.

## Updating Costs and Prices

1. Click on *Data Items* on the side pane
2. Click on *Food Management*
3. Click on *Recipe Management (All Items)*
4. Click on the item you want to update
5. In the Pricing tab locate Total Cost
6. Change the cost
7. Click Save

👑 Recipe Information - (ID#: 540 - Albacore Tuna Salad)  
 Edit Recipe Related Information ? - □ ×

Recipe
Pricing
Additional Info
Recipe Prep
Equipment
Cost Centers (Business Units) & Inventory
Web Details

<b>Retail Price</b>	<input type="text" value="\$7.00"/>	<b>Per Person   Per Unit</b>	
<b>Retail Selling Price Base on Event Types</b>			
100's	<input type="text" value="\$0.00"/>	400's	<input type="text" value="\$0.00"/>
200's	<input type="text" value="\$0.00"/>	500's	<input type="text" value="\$0.00"/>
300's	<input type="text" value="\$0.00"/>	600's	<input type="text" value="\$0.00"/>
		700's	<input type="text" value="\$0.00"/>
		800's	<input type="text" value="\$0.00"/>
		900's	<input type="text" value="\$0.00"/>

<b>Financials (Food Cost Calculator)</b>			
<b>Total Recipe</b>	<b>Per Guest</b>		
Total Cost	<input type="text" value="\$4.50"/>	Total Cost	<input type="text" value="\$0.00"/>
Cost Percent	<input type="text" value=".00 %"/>	Cost Percent	<input type="text" value=".00 %"/>
Selling Price	<input type="text"/>	Selling Price	<input type="text" value="\$0.00"/>
Gross Profit	<input type="text" value="\$0.00"/>	Gross Profit	<input type="text" value="\$0.00"/>

History

Save

**Important:** The same procedure applies to drinks, equipment, and miscellaneous items.

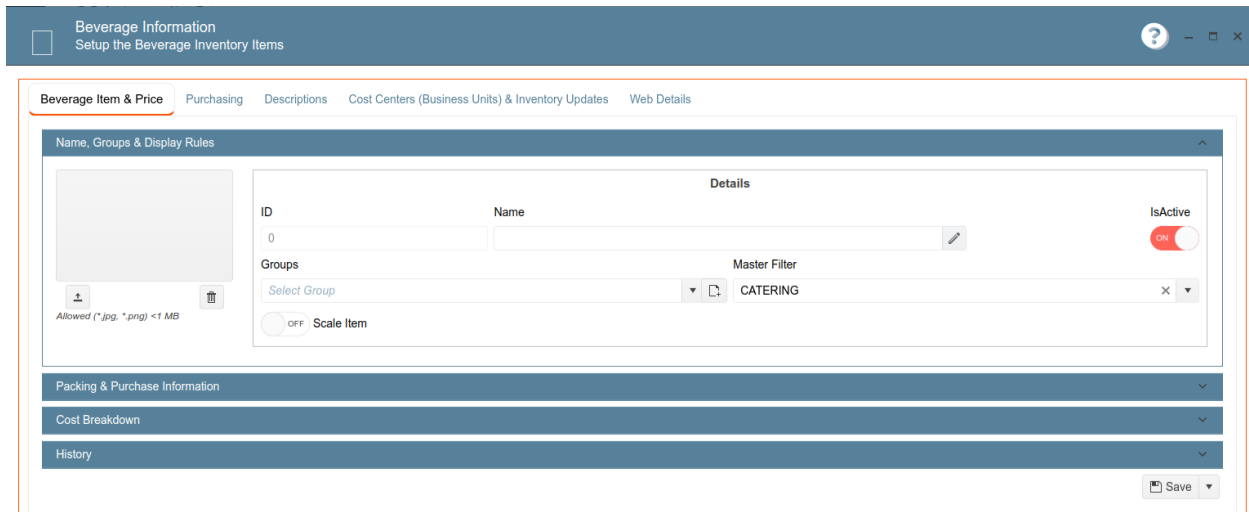
# Beverage Management

## Adding New Beverage

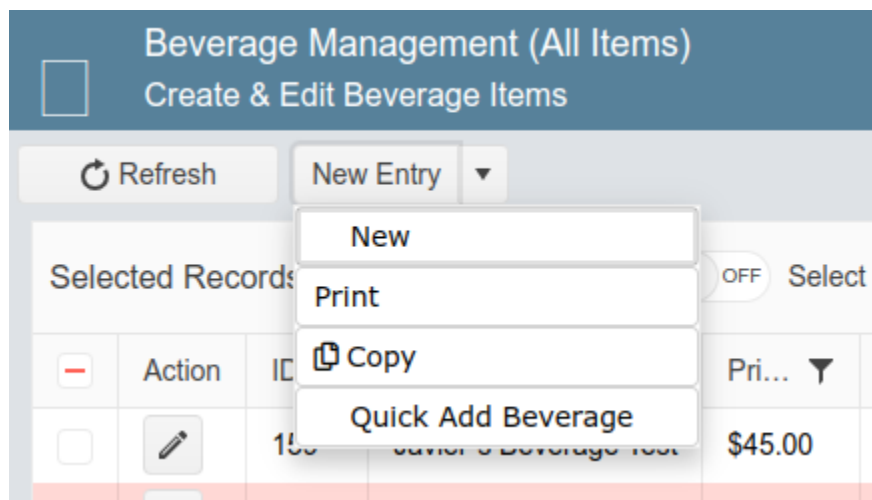
1. Click on *Data Items* in the side panel
2. Select *Beverage Management* and then click on *Beverage Management (All Items)*
2. Click on *New Entry*
3. From the *Beverage Information* window, you can enter the required information
6. Click on *Save*.

\* All these fields are required to save changes successfully.

**Tip:** By clicking the arrow in the New Entry button, you can either copy an existing record or generate a Quick Add Beverage.



The screenshot shows the 'Beverage Information' form. At the top, it says 'Beverage Information' and 'Setup the Beverage Inventory Items'. Below this is a navigation bar with tabs: 'Beverage Item & Price', 'Purchasing', 'Descriptions', 'Cost Centers (Business Units) & Inventory Updates', and 'Web Details'. The main form area is titled 'Name, Groups & Display Rules'. It contains several fields: 'ID' (value: 0), 'Name' (empty), 'IsActive' (toggle: ON), 'Groups' (dropdown: Select Group), and 'Master Filter' (dropdown: CATERING). There is also a 'Scale Item' toggle (OFF). Below the main form are sections for 'Packing & Purchase Information', 'Cost Breakdown', and 'History'. A 'Save' button is located at the bottom right.

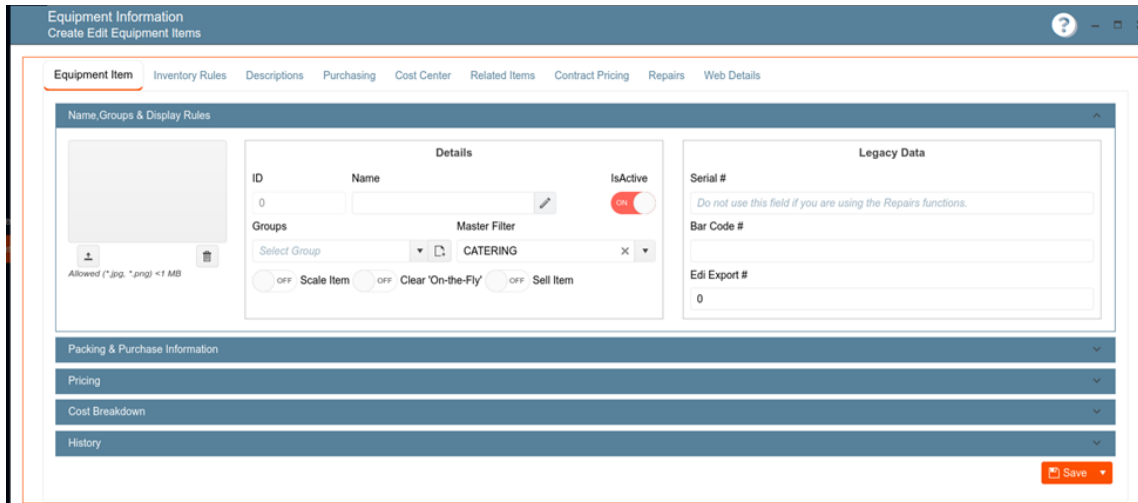




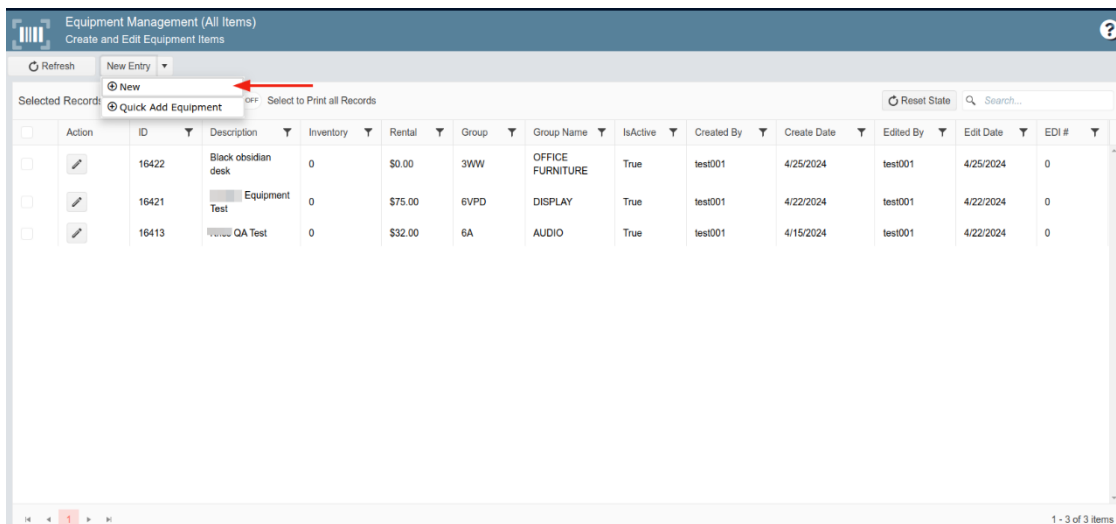
# Equipment Management

## Adding New Equipment

1. Click on *Data Items* in the side panel,
2. Select *Beverage Management* and then click on *Beverage Management (All Items)*
2. Click on *New Entry*
3. Fill in all the information about the equipment you want to add. Name of the equipment and Group are required fields to save changes successfully
4. Click on *Save*



**Tip:** By clicking the arrow in the New Entry button, you can either copy an existing record or get Quick Add Equipment.



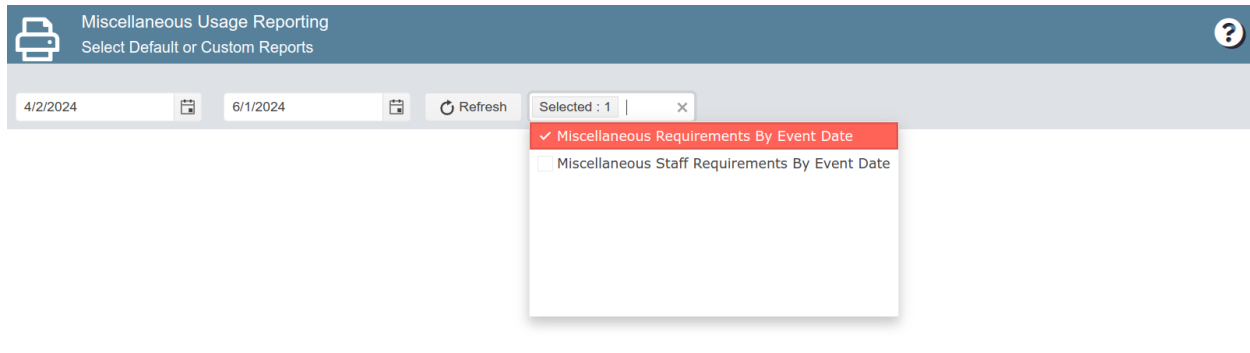
Action	ID	Description	Inventory	Rental	Group	Group Name	Is Active	Created By	Create Date	Edited By	Edit Date	EDI #
	16422	Black obsidian desk	0	\$0.00	3WW	OFFICE FURNITURE	True	test001	4/25/2024	test001	4/25/2024	0
	16421	Equipment Test	0	\$75.00	6VPD	DISPLAY	True	test001	4/22/2024	test001	4/22/2024	0
	16413	QA Test	0	\$32.00	6A	AUDIO	True	test001	4/15/2024	test001	4/22/2024	0

# Miscellaneous Items

There are numerous types of items that can be added to your account, if the description of these items doesn't fit on the previous categories, you can add and edit them on miscellaneous items.

## Miscellaneous Usage Reporting

1. Go to *Data Items* on the side panel
2. Click on *Miscellaneous Items*
3. Access to *Reports* and click on *Miscellaneous Usage Reporting*
4. Set a date range for the report that you want to get
5. Select *Miscellaneous Staff Requirements by Event Dates*
6. Click on *Refresh*
7. Click on *Print to* button and select the preferred item
8. The report will generate

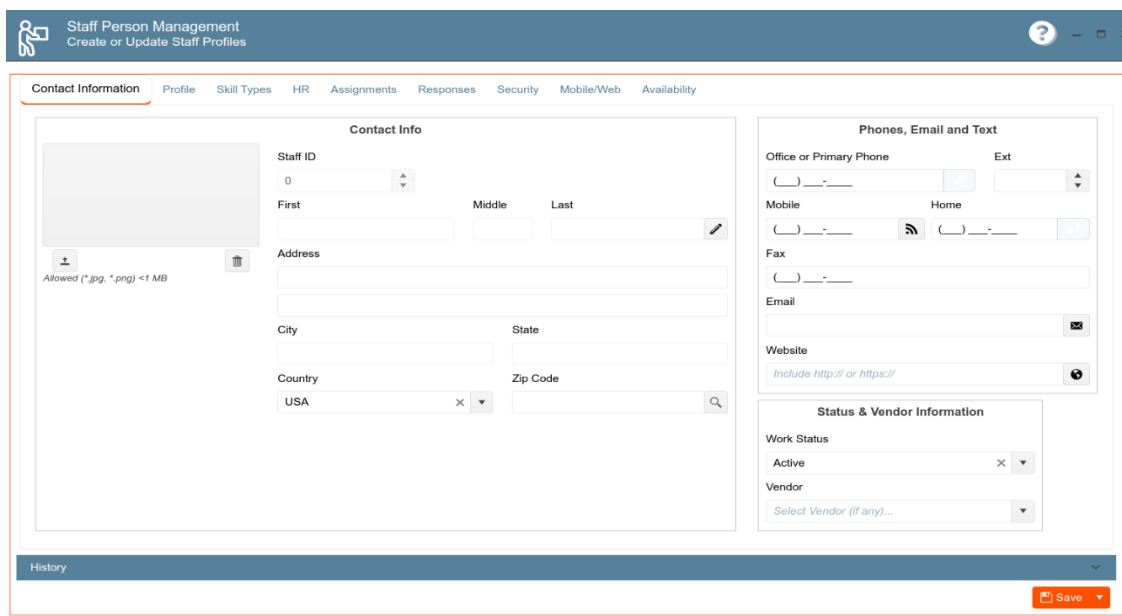


# HR Management

In the HR Management section, you can manage your employees' information and skills in a single place.

## Adding a New Staff Member

1. Click on *Data Items* in the side panel
3. Click on *HR Management*, then click on *HR Management (All Staff)*
4. Click on *New Entry* button
5. A pop-up window will appear
7. Fill in all the necessary information. Take into consideration that First Name, Last Name, Address, City, and State must be included to save changes successfully.
8. Click on *Save*.

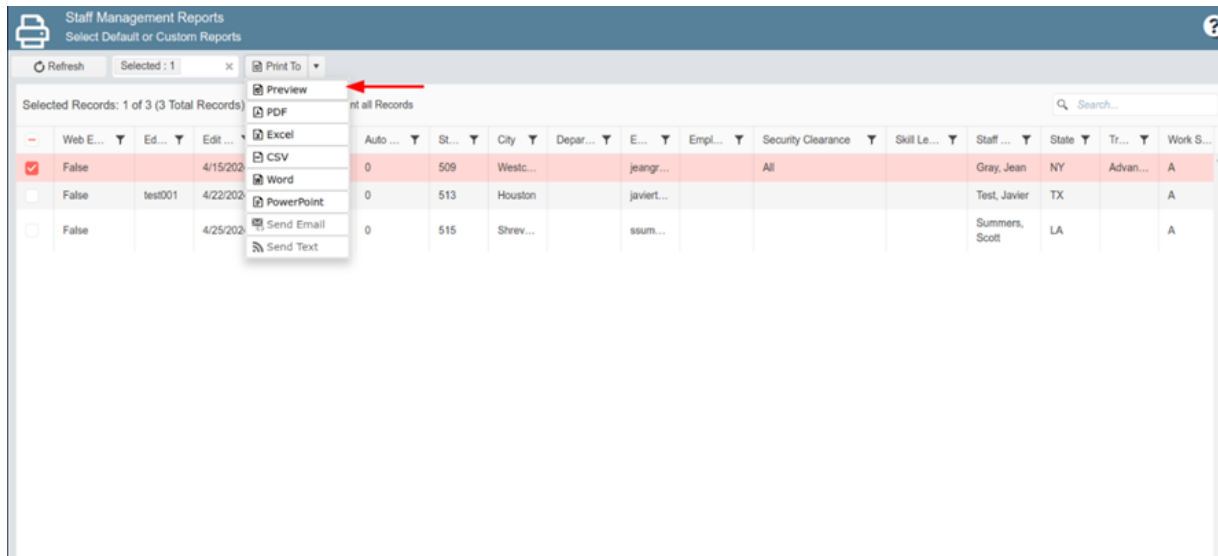


The screenshot shows a web application interface for "Staff Person Management" with the subtitle "Create or Update Staff Profiles". The interface includes a top navigation bar with a user icon and a help icon. Below the navigation bar is a horizontal menu with tabs: "Contact Information", "Profile", "Skill Types", "HR", "Assignments", "Responses", "Security", "Mobile/Web", and "Availability". The "Contact Information" tab is active. The main content area is divided into three sections: "Contact Info", "Phones, Email and Text", and "Status & Vendor Information". The "Contact Info" section contains fields for Staff ID (0), First, Middle, Last, Address, City, State, Country (USA), and Zip Code. The "Phones, Email and Text" section contains fields for Office or Primary Phone, Ext, Mobile, Home, Fax, Email, and Website. The "Status & Vendor Information" section contains fields for Work Status (Active) and Vendor (Select Vendor (if any)...). A "Save" button is located at the bottom right of the form. A "History" dropdown is located at the bottom left of the form.

## Staff Management Reports

Using the *Staff Management Report* users can print a list of staff members and their associated skill types.

1. Click on *Data Items* in the side panel
2. Click on *HR Management*
3. Access to *Reports*
4. Click on *Staff Management Reports*
5. Select *Staff Detail Skill Type List*
6. Click on *Refresh*
7. Click on the down arrow next to the *Print to* button and select the preferred format
8. Elecate will generate the report.



The screenshot shows the 'Staff Management Reports' interface. At the top, there is a 'Print To' dropdown menu with a red arrow pointing to it. The menu options include: Preview, PDF, Print all Records, Excel, CSV, Word, PowerPoint, Send Email, and Send Text. Below the menu is a table with the following columns: Web E..., Ed..., Edit..., Auto..., St..., City..., Depar..., E..., Empl..., Security Clearance, Skill Le..., Staff..., State..., Tr..., and Work S... The table contains three rows of data:

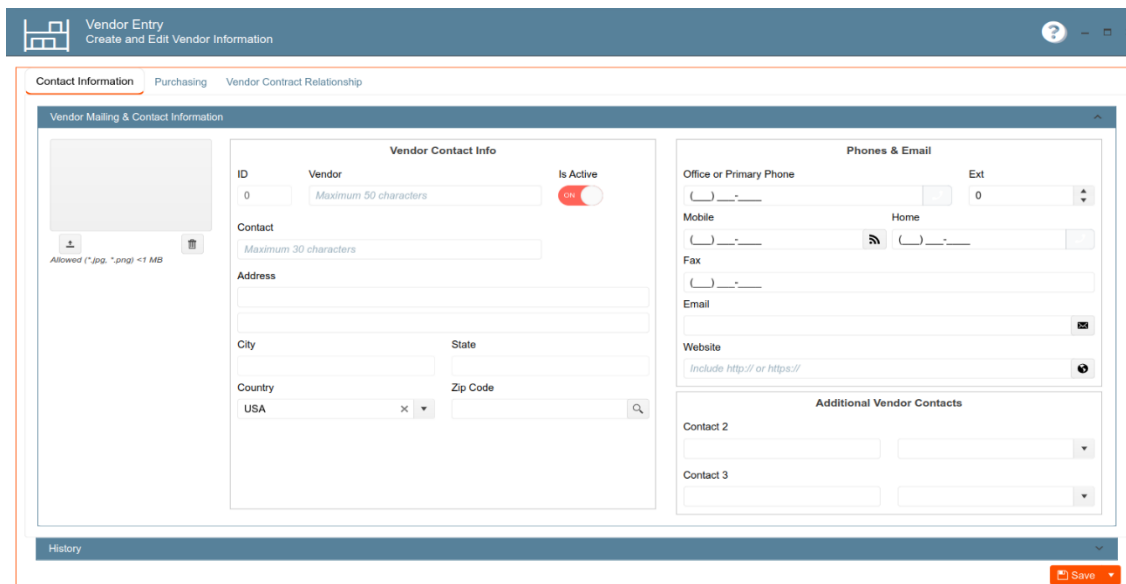
Web E...	Ed...	Edit...	Auto...	St...	City...	Depar...	E...	Empl...	Security Clearance	Skill Le...	Staff...	State...	Tr...	Work S...
<input checked="" type="checkbox"/>	False		4/15/2022	0	509	Westc...	jeangr...		All		Gray, Jean	NY	Advan...	A
<input type="checkbox"/>	False	test001	4/22/2022	0	513	Houston	javiert...				Test, Javier	TX		A
<input type="checkbox"/>	False		4/25/2022	0	515	Shrev...	ssum...				Summers, Scott	LA		A

# Vendor Management

## Adding a New Vendor

Vendor management involves overseeing and optimizing relationships with suppliers, vendors, or external partners. In this section you can manage the contact information.

1. Go to *Data Items* in the side panel
2. Click on *Vendor Management*, then click on *Vendor Management- All Vendors*
3. Click on *New Entry* button
4. A pop-up window will appear
5. Fill in all the necessary information. Take into consideration that Vendor Name, Contact, Address, City, State, County Zip Code, and Primary phone number must be included to save changes successfully
9. Click on *Save*.



The screenshot shows a web application window titled "Vendor Entry" with the subtitle "Create and Edit Vendor Information". The main content area is titled "Vendor Mailing & Contact Information" and contains several sections:

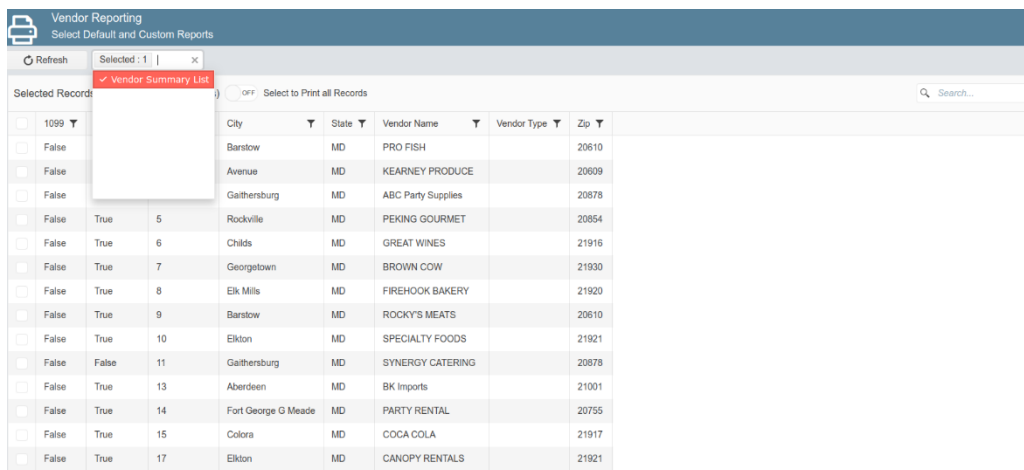
- Vendor Contact Info:** Includes fields for ID (0), Vendor name (Maximum 50 characters), and an "Is Active" toggle switch (currently ON).
- Contact:** A text field for the contact name (Maximum 30 characters).
- Address:** A multi-line text area for the address.
- City and State:** Text fields for city and state.
- Country and Zip Code:** A dropdown menu for country (set to USA) and a text field for zip code.
- Phones & Email:** Includes fields for Office or Primary Phone, Ext (0), Mobile, Home, Fax, Email, and Website (with a note to include http:// or https://).
- Additional Vendor Contacts:** Fields for Contact 2 and Contact 3.

At the bottom right of the form is a "Save" button. A "History" tab is visible at the bottom left.

## Vendor Reporting

Just as in the other categories, you can get different reports for your vendors.

3. Go to *Data Items* in the side panel
4. Click on *Vendor Management*, then access to *Reports*
4. Click on *Vendor Reporting*
5. Select the vendor from which you want the report by clicking once on it
6. From the *Select Reports* box, Select *Vendor Summary List*
7. In the *Print to* button select the format you need
8. Elecate will generate the report.



The screenshot shows the 'Vendor Reporting' interface. At the top, there is a header 'Vendor Reporting' and a sub-header 'Select Default and Custom Reports'. Below this is a toolbar with a 'Refresh' button and a 'Selected: 1 | x' indicator. A dropdown menu is open, showing 'Vendor Summary List' as the selected option. Below the menu is a table of vendors with columns for 'City', 'State', 'Vendor Name', 'Vendor Type', and 'Zip'. The table contains 17 rows of vendor data.

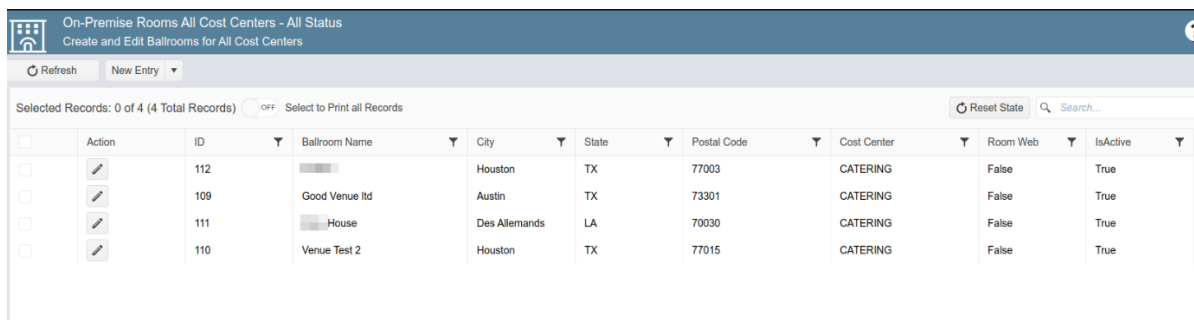
	City	State	Vendor Name	Vendor Type	Zip
<input type="checkbox"/>	Barstow	MD	PRO FISH		20810
<input type="checkbox"/>	Avenue	MD	KEARNEY PRODUCE		20809
<input type="checkbox"/>	Gaithersburg	MD	ABC Party Supplies		20878
<input type="checkbox"/>	Rockville	MD	PEKING GOURMET		20854
<input type="checkbox"/>	Childs	MD	GREAT WINES		21916
<input type="checkbox"/>	Georgetown	MD	BROWN COW		21930
<input type="checkbox"/>	Elk Mills	MD	FIREHOOK BAKERY		21920
<input type="checkbox"/>	Barstow	MD	ROCKY'S MEATS		20810
<input type="checkbox"/>	Elkton	MD	SPECIALTY FOODS		21921
<input type="checkbox"/>	Gaithersburg	MD	SYNERGY CATERING		20878
<input type="checkbox"/>	Aberdeen	MD	BK Imports		21001
<input type="checkbox"/>	Fort George G Meade	MD	PARTY RENTAL		20755
<input type="checkbox"/>	Colora	MD	COCA COLA		21917
<input type="checkbox"/>	Elkton	MD	CANOPY RENTALS		21921

# Venue Management

## Adding a New Venue

You can oversee and store all the relevant venue information from contact info (address and phone) to rules and features. These instructions apply to both On and Off Premise Venues.

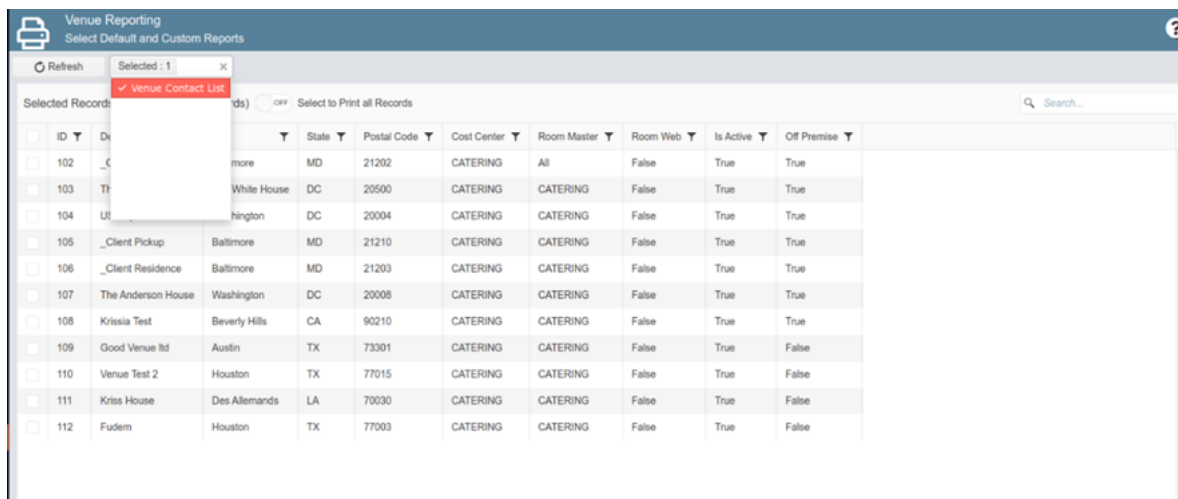
1. Access to Data Items on the side panel
2. Go to *Venue Management*, then select *On or Off-Premises Rooms All Cost Centers*
4. Click on *New Entry*, a pop-up window will appear
5. Fill in all the necessary information. Take into consideration that, Name, Address, City, State, County Zip Code, and Primary phone number, and email must be included to save changes successfully
9. Click on *Save*.



	Action	ID	Ballroom Name	City	State	Postal Code	Cost Center	Room Web	IsActive
<input type="checkbox"/>		112		Houston	TX	77003	CATERING	False	True
<input type="checkbox"/>		109	Good Venue ltd	Austin	TX	73301	CATERING	False	True
<input type="checkbox"/>		111	House	Des Allemands	LA	70030	CATERING	False	True
<input type="checkbox"/>		110	Venue Test 2	Houston	TX	77015	CATERING	False	True

## Venue Report

3. Click on Data Items on the side panel
4. Go to *Reports*, then select *On or Off-Premises Rooms All Cost Centers*
4. Access to *Venue Reporting* window
5. Select the report you need
6. Select the preferred format
7. Elecate will generate the report



ID	State	Postal Code	Cost Center	Room Master	Room Web	Is Active	Off Premise
102	MD	21202	CATERING	All	False	True	True
103	DC	20500	CATERING	CATERING	False	True	True
104	DC	20004	CATERING	CATERING	False	True	True
105	MD	21210	CATERING	CATERING	False	True	True
106	MD	21203	CATERING	CATERING	False	True	True
107	DC	20008	CATERING	CATERING	False	True	True
108	CA	90210	CATERING	CATERING	False	True	True
109	TX	73301	CATERING	CATERING	False	True	False
110	TX	77015	CATERING	CATERING	False	True	False
111	LA	70030	CATERING	CATERING	False	True	False
112	TX	77003	CATERING	CATERING	False	True	False